

AiM 4.1 User Manual

Supervisors & Assistant Supervisors

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Introduction

This manual will provide an overview of the AiM application, modules, and step-by-step instructions to complete individual screens within the modules.

Based on an individual's role the setup and modules available will determine the options available to users for use when working with this application.

Overview

In this manual you will learn how to:

- Logon to the AiM 4.1 application
- Identify terminology
- Identify icons
- Select a module
- Work with screens
- Perform a Search Query
- Create a Personal Query
- Use Note Logs
- Create a timecard using Rapid Timecard Entry
- Make corrections/changes to timecards
- Add descriptions to timecards
- Approve timecards
- Complete material and equipment requests
- Approve material and equipment requests
- Complete a Pick Ticket
- Complete a Counter Release
- Complete a Counter Return
- Create a Work Order
- Create a Phase for an existing Work Order
- Assign Work Orders
- Close work orders and phases

AiM Navigation

Getting Started

This section is designed to provide general navigation information that is needed when working with the AiM 4.1 application. It includes terminology and steps for accessing and navigating the system.

Terminology

This list provides a description of terms referenced in this manual and used in the AiM application.

Closed work order	A closed work order indicates that all work has been completed and all materials have been charged to the work order. It does not imply that all charges have been billed.
Customer Request	The customer request is the screen used to submit on-line requests for work. It defines what work is to be performed, who the work is for, and where the work is located. A customer request must be approved to become a work order.
Multi- shop work orders	These are work orders that require involvement of multiple shops to get a job done. The first shop assigned to a multiple shop work order is the “responsible” shop for coordinating the closure of the work order.
Non- Reimbursable	A work order is considered non-reimbursable if the work is routine maintenance to I&G funded buildings. An example of a non-reimbursable work order is <u>moving furniture on campus</u> .
Open work order	An open work order is a work order that is being actively worked on by shops. Shops can charge time and material to an open work order.
Non- Shop Stock	Inventory that is maintained in the Main Warehouse.
Phase	The phase is used for tracking each task performed in a work order. It defines the specific task details including: the work to be performed, the location of the work, who will perform the work, which asset or equipment is worked on, and when to perform the work.
Property	Identifies the building and is represented by an assigned number in the AiM system.
Reimbursable (Billable)	A work order is considered reimbursable if the work includes non-routine maintenance of I&G funded buildings or is not I&G related. Examples of reimbursable work are moving furniture off campus or setting up tables and chairs on campus.
Rapid Timecard Entry	The rapid timecard entry screen is used to quickly enter multiple time card records in a single entry screen. This will be the method for time entry for all non-exempt employees.
Shop Stock	Most of the OFS inventory is maintained in the Warehouse, but some areas maintain a small inventory within their shops. This inventory is known as shop stock.
Single shop work order	Work orders that can be completed within a single shop. A single shop work order may evolve into a multiple shop work order.
Work Order	The work order is the main screen used for tracking work in the system. It defines what work is to be performed, who the work is for, where the work is located, and how the work is classified.
Closed phase	A work order may have multiple shops (phases) involved. If a work order phase is closed for a particular shop, that shop cannot charge time or materials to that work order. Other shops assigned to work order may charge time and material to the work order as long as the phase is still open.

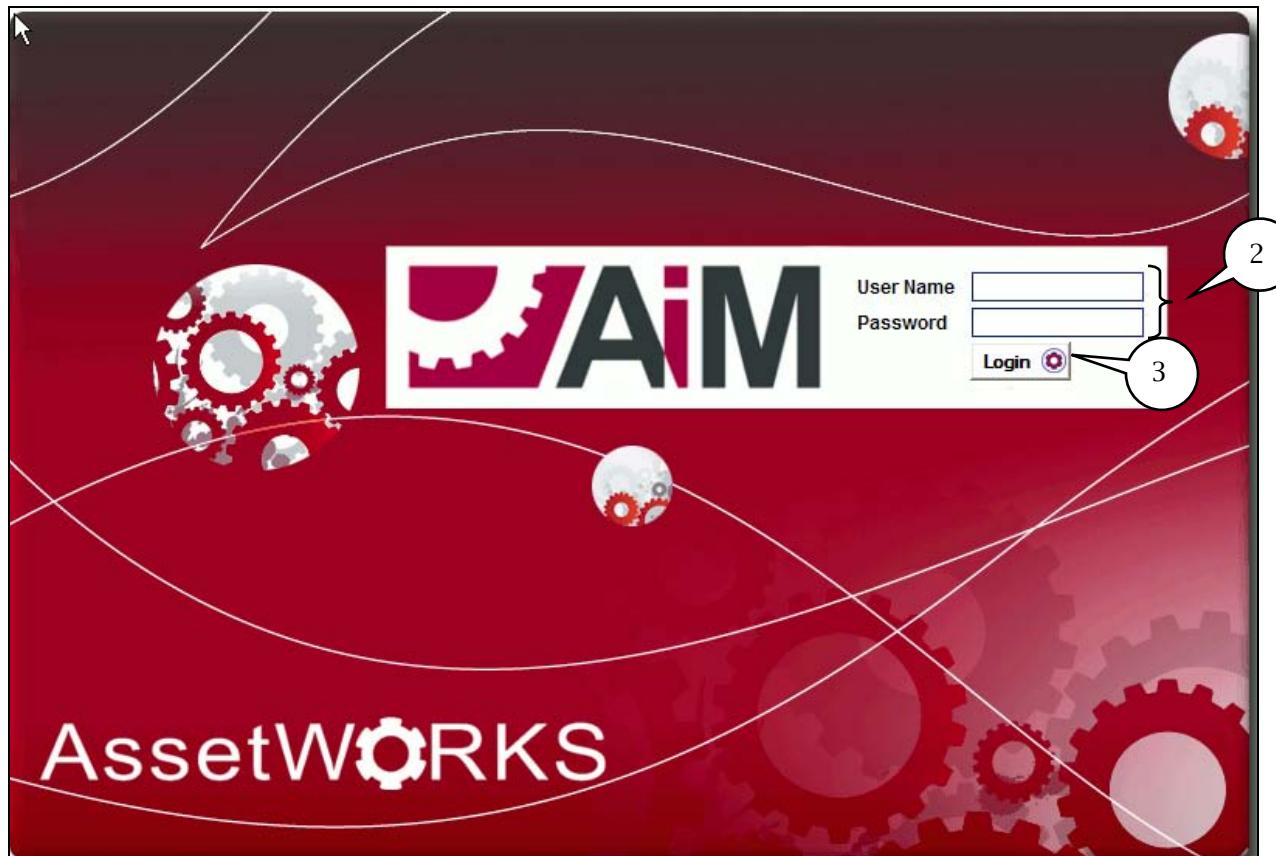
Logging on Process

AiM supports authenticated user access, meaning that the system verifies your credentials and you are given access to the system based on your assigned security. To use AiM as an authenticated user, you must successfully logon by providing your credentials: MyNMSU Username and Password.

AiM can be accessed from any Internet browser such as Internet Explorer, Netscape, or Mozilla Firefox.

1. Type **http://fms-prod.nmsu.edu/fmax** in the address bar of your web browser and press Enter.

The logon screen will be displayed.



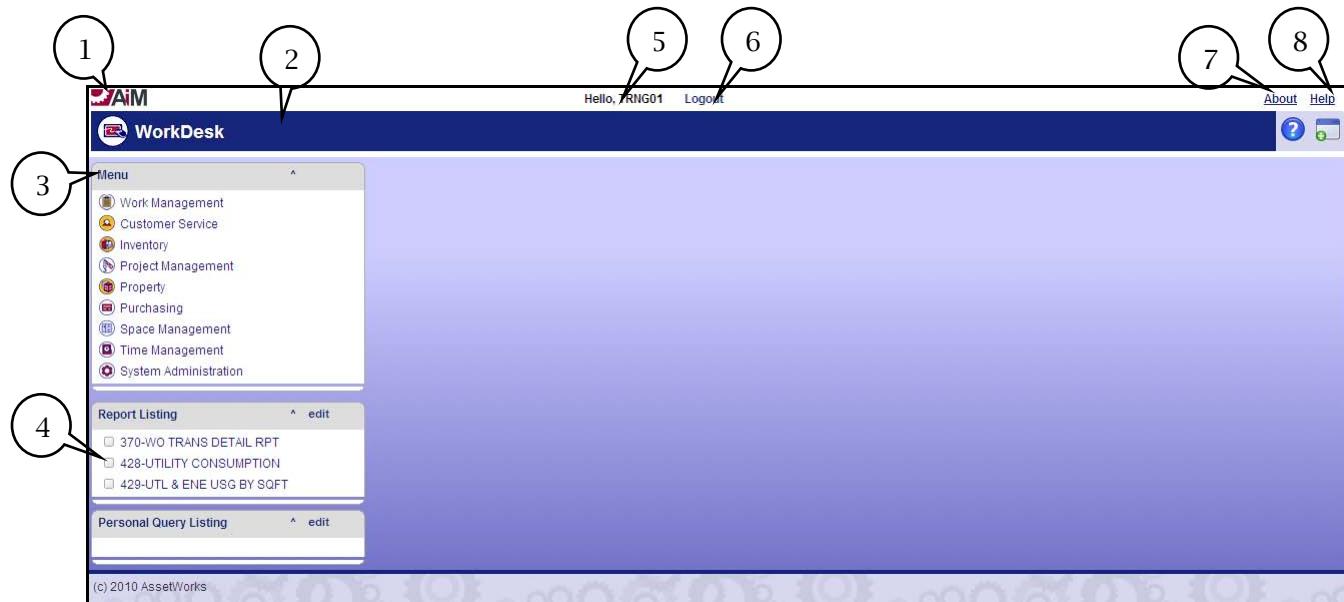
2. Enter your **User Name** and **Password** in the field boxes.
3. Click on the **Login** button.

Team Tip:



You can create a bookmark in your browser for quick access to the AiM system.

Once you have logged on the **WorkDesk** will be displayed.



1. AiM icon identifies the vendor.

Note: When navigating away from the **WorkDesk** and working within the application it may be necessary to return to the **WorkDesk**. This can be performed by clicking on the **AiM** icon.

2. The **header** will display the **WorkDesk** and a **Module** once selected.
3. **Menu** will display Modules available for use (based on security Menu options may vary).
4. **Reporting Listing** will display a list of available reports. Reports listing will also be accessible from various Modules.
5. Greeting and **User ID** are displayed and identify the current logged on user.
6. **Logout** link is displayed and used to exit the application.

Note: It is recommended to logout properly from the application by using the **logout** link.

7. **About** provides vendor information and version of application.
8. **Help** provides access to on-line Help (this information comes with the application).

Team Tip:

Once logged on, use the icons within the application to navigate; do not use the browser options available. To properly logoff, use the **Logout** link; do not use the X(exit browser options).

Navigation Icons

Below is a list of the common navigation icons that may be displayed while working within the application.

Icon	Description	Keyboard Short Cuts	Icon	Description	Keyboard Short Cuts
	New	Alt + I		Quick Find Filter	Alt + F
	Edit	Alt + E		Zoom	Alt + Z
	Back to Browser	Alt + B		Cancel	Alt + C
	Save	Alt + S		Done	Alt + O
	Copy Record	Alt + Y		Previous Browse	Alt + P
	Email Record	Alt + M		Next Browse	Alt + N
	Print	Alt + J		First Browse	Alt + F
	Export	Alt + V		Last Browse	Alt + L
	Execute Search	Alt + S		Go	Alt + G
	Search	Alt + S		Next	Alt + 3
	Help	Alt + ?	Intentionally left blank	Intentionally left blank	Intentionally left blank

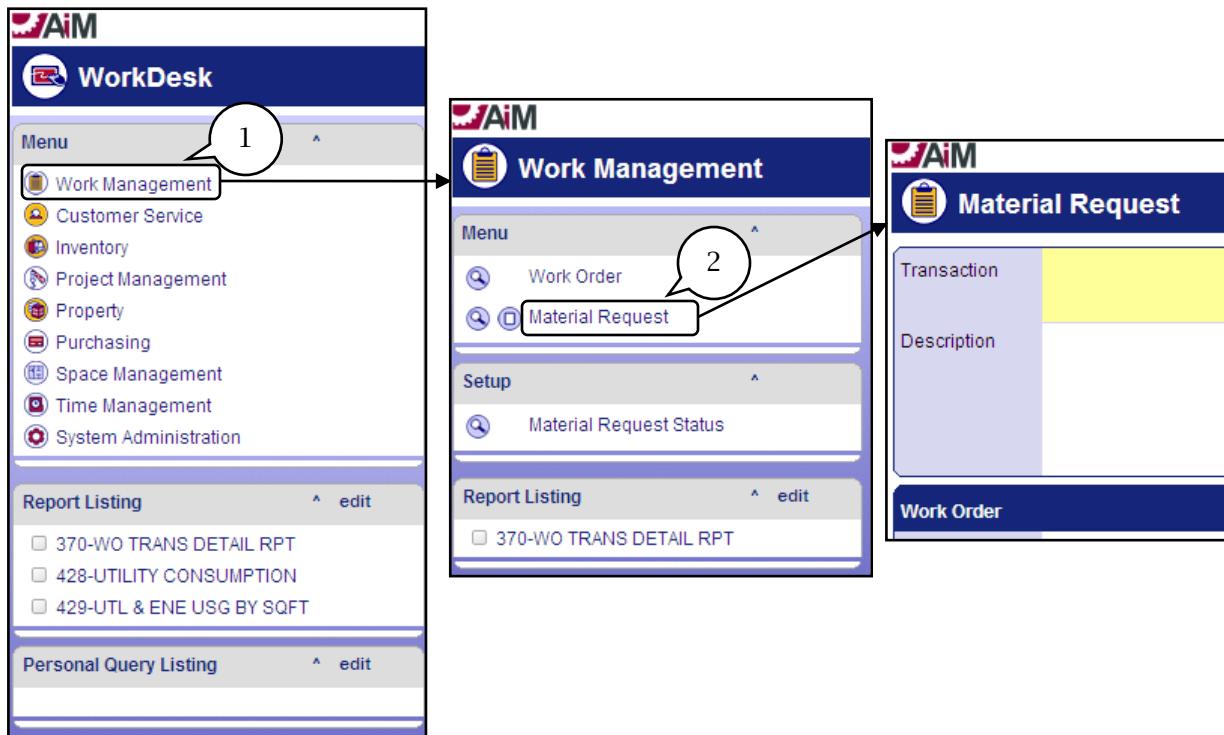
Below is a list of additional icons that may be displayed while working within the application.

Icon	Description	Keyboard Short Cuts	Icon	Description	Keyboard Short Cuts
	Add Detail Record	Alt + A		Error Log	Alt + L
	Delete Detail Record	Alt + D		Error Flag	Intentionally left blank
	Approve/Yes	Alt + A		Reset	Alt + R
	Reject/No	Alt + R		Add Query	Alt + A
	Generate	Alt + G		Remove Query	Alt + D
	Add Content(WorkDesk)	Alt + I		Reset (WorkDesk)	Alt + R

Note: The keyboard short cuts are dependent on the screen displayed.

Navigation from WorkDesk to Module to Screen

Displayed below is the flow to access a screen from the *WorkDesk*. This process is applicable for accessing all modules.



1. Select desired **Module**. **Module** will be displayed.
2. Select desired Screen. Screen will be displayed.

Selecting A Module

When working with a **Module**, screens are available for selection allowing required activity to be performed based on the user's role.



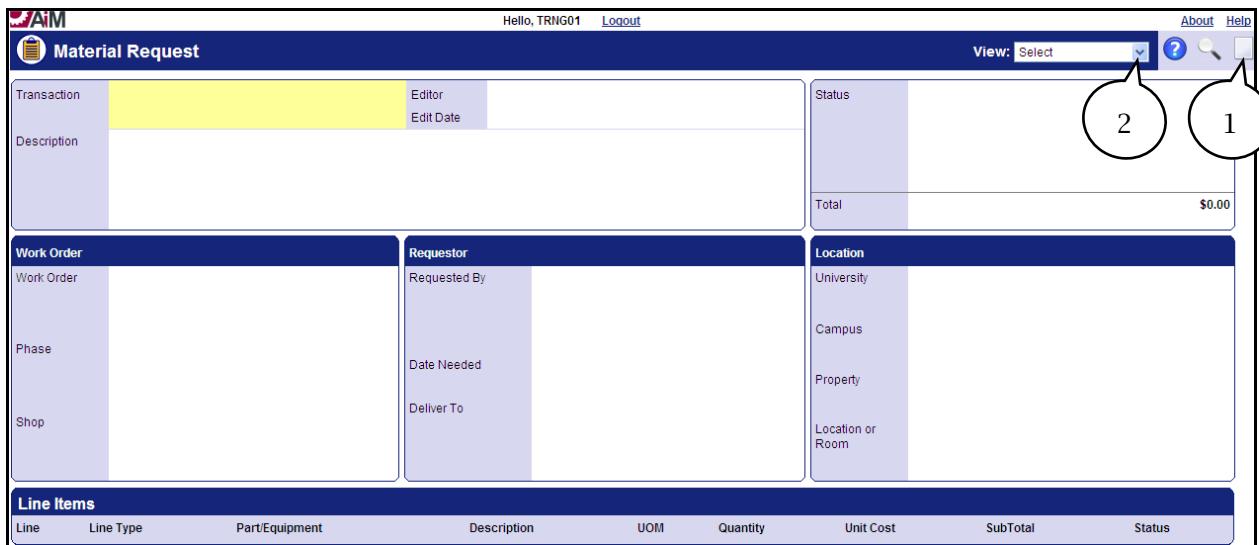
1. To select a **Module** place cursor over the desired **Module** and click to select. **Module** will be displayed. Once in a Module a list of screens will be available for selection as displayed below.



2. Selected **Module** and **Menu** options will be displayed.
3. The Icon identifying the **Module** will be displayed. When working in a screen, clicking on the **Module** Icon will return the **Module** Menu.
4. To go directly to a Screen, click on desired **Screen** name from the menu list.
5. The **Search** icon directly opens the **Search** options for that screen, allowing a quick search of a record or data on the screen displayed.
6. By clicking on the **New** icon, it opens a new record in edit mode, ready for information to be entered.

Working in a Screen

Once a screen is open it will always be in a query state. To create a new or edit a record, use the applicable icons displayed in the header on the right hand corner of the main title bar.



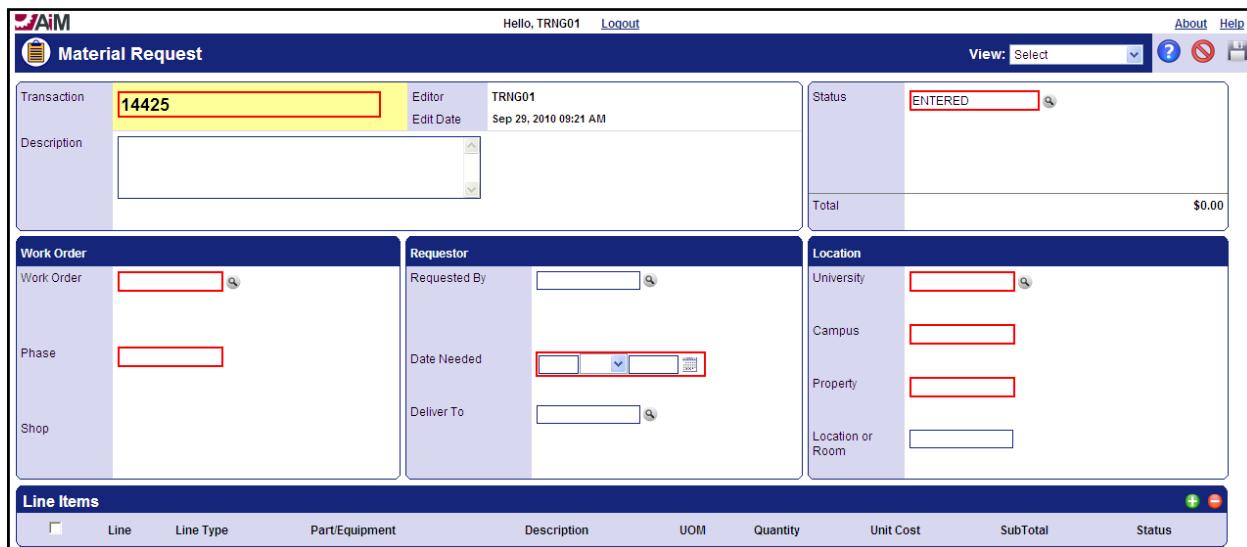
The screenshot shows the 'Material Request' screen in AiM 4.1. The interface is organized into several sections:

- Header:** Hello, TRNG01 | Logout | About | Help
- Transaction:** A yellow-highlighted section containing 'Editor' and 'Edit Date' buttons.
- Status:** A section with a dropdown menu labeled 'View: Select' and a magnifying glass icon.
- Work Order:** A section with fields for 'Work Order', 'Phase', and 'Shop'.
- Requestor:** A section with fields for 'Requested By', 'Date Needed', and 'Deliver To'.
- Location:** A section with fields for 'University', 'Campus', 'Property', and 'Location or Room'.
- Line Items:** A table with columns: Line, Line Type, Part/Equipment, Description, UOM, Quantity, Unit Cost, SubTotal, and Status.

Two callout bubbles are present:

- Bubble 1 points to the 'Select' dropdown in the Status section.
- Bubble 2 points to the 'Edit Date' button in the Transaction section.

1. To request new **Material Request** click on the **New** icon which will open the screen and place it in a ready state for fields to be completed.
2. The **View** field provides additional screens available while working within a screen.



The screenshot shows the AiM 4.1 Material Request screen. At the top, it displays 'Hello, TRNG01' and 'Logout' with a 'View: Select' dropdown and standard application icons. The main area is titled 'Material Request' and contains several data blocks:

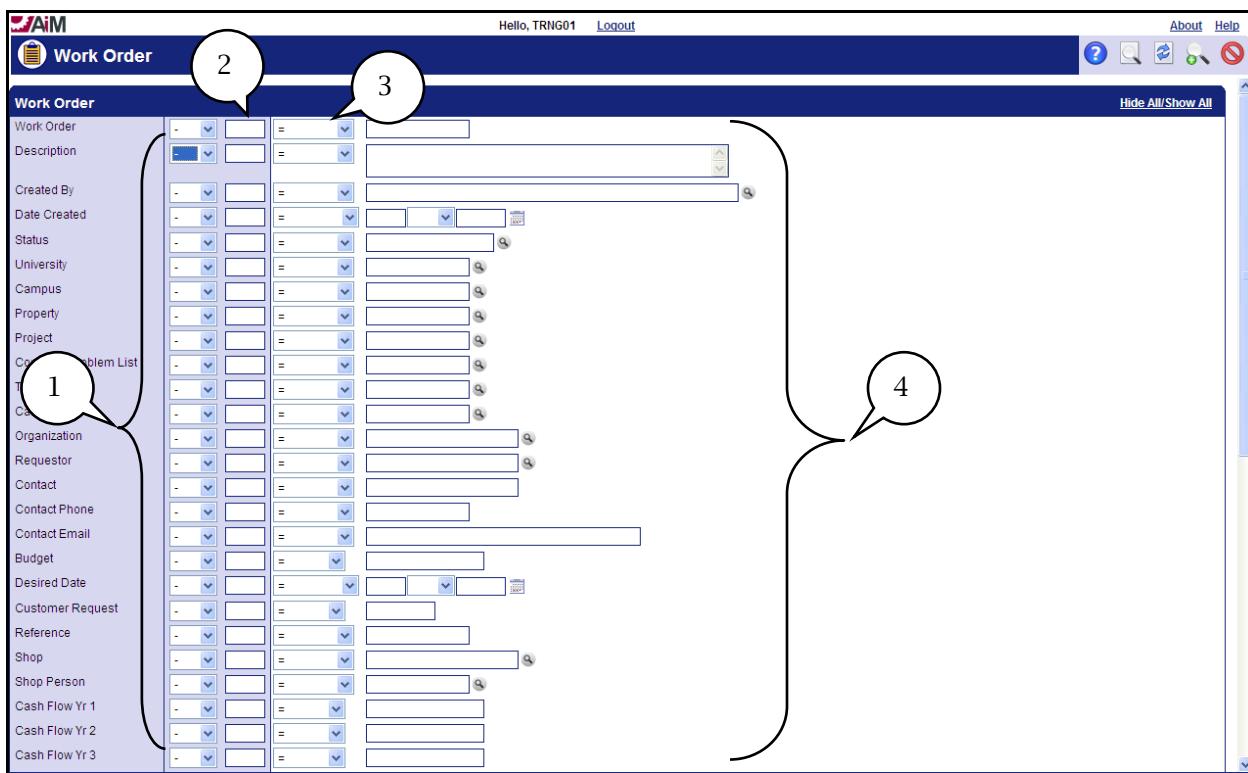
- Header Block:** Transaction (14425), Editor (TRNG01), Edit Date (Sep 29, 2010 09:21 AM), Status (ENTERED), and Total (\$0.00).
- Work Order Block:** Work Order (red box), Phase (red box), and Shop.
- Requestor Block:** Requested By (red box), Date Needed (red box), and Deliver To (red box).
- Location Block:** University (red box), Campus (red box), Property (red box), and Location or Room (red box).
- Line Items Block:** A table with columns: Line (checkbox), Line Type, Part/Equipment, Description, UOM, Quantity, Unit Cost, SubTotal, and Status. The 'Line' column has a red box around its header.

3. When working on a new screen or editing a screen, required fields are outlined in red. Information is segmented into data Blocks with headings (example: above shows **Work Order**, **Requestor** and **Location** blocks).

Search Screen Defined

The **Search** screen is a very powerful option within the application that gives users the ability to perform various types of searches based on criteria entered. This section will provide a general overview and introduction of the options available on the **Search** screen. The **Module** displayed will determine the data criteria that are available for selection.

When performing a **Search** ask the question, “What information am I looking for?” This will assist when keying in the exact criteria needed to perform the **Search**.



With the **Search** screen displayed perform a search by using the various search options listed below.

1. Ascending/Descending fields. This option can be used to have search results in Ascending/Descending order. From the drop down list make desired selection.
2. **Sort sequences** fields. This is optional and not required to perform a **Search**. To sort your **Search** results in a specific order you can use the **Sort Sequence** fields. In the box enter your order by placing 1, 2, etc. This will display and sort the fields on the results screen.

3. **Operator** (text qualifiers) field, drop down box: Use any of the standard operations to assist in narrowing searches to find the exact information desired.

Standard Operations

=	Equal
<	less than
>	greater than
>=	greater than or equal to
<=	less than or equal to
<>	not equal to
Starts with (starts w/string entered)	
Ends with (ends w/string entered)	
Contains (contains the string entered anywhere in the field)	
Null (must contain a value)	
Not null (must Not contain a value)	
In (list items to include)	
Not in (list items to omit)	
Between: Dates only (fill in as required)	
Within: Dates only (fill in as required)	
Older than (select desired option)	
Newer than (select desired option)	

4. **Criteria** field: Within the field box, enter the information needed to perform the search, or by using the **Zoom** icon the appropriate selection options will be displayed.

Note: If searching in a *Description* field, consider selecting *Contains* from the operator field and then using the *Wild Card %* (percent sign) before and after the criteria entered to define your *Search*. It is recommended to keep a *Search* to one or two words. Example: looking for the word “Air”, enter %Air% in the description field. If using two words, enter %Air%>%conditioning%.

Team Tip:

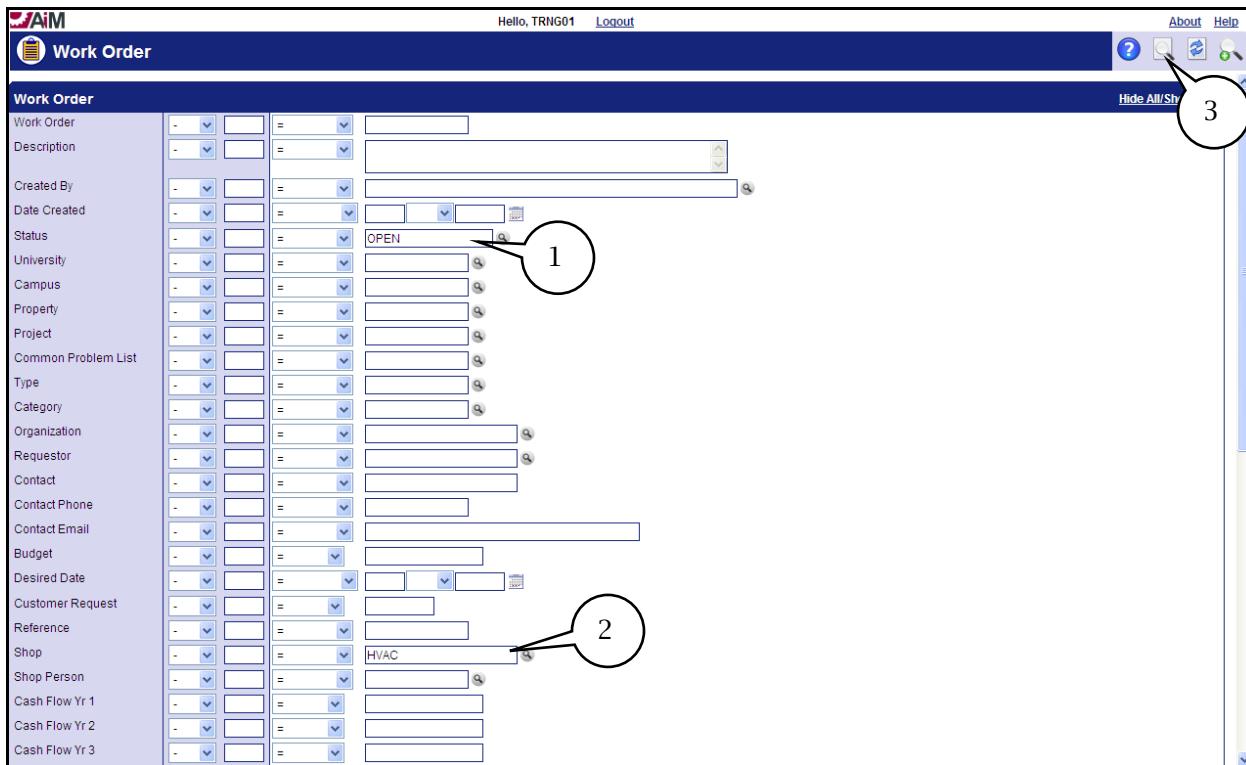


While working in the Search Screen you may find that some fields may be hidden. To display hidden fields click on *Show* if you want to hide fields click on *Hide*.

Performing a Search Query

Below is an example of performing a *Search Query*. Remember based on your *Module* selection, criteria fields displayed may vary.

With the *Search* screen displayed, search for all open work orders for a shop by completing the following steps.



The screenshot shows the 'Work Order' search screen. The 'Status' field (row 1) contains 'OPEN' and is circled with number 1. The 'Shop' field (row 20) contains 'HVAC' and is circled with number 2. The 'Search' icon in the top right corner (row 21) is circled with number 3. The title bar includes 'Hello, TRNG01' and 'Logout'.

1. Type “open” in the **Status** field (fields are not case sensitive).
2. Type “HVAC” or desired **Shop** in the **Shop** field.

Note: To display a listing of the data fields, use the *Zoom* icon. Leave the **Shop** field blank. Click on the *Zoom* icon and select a shop.

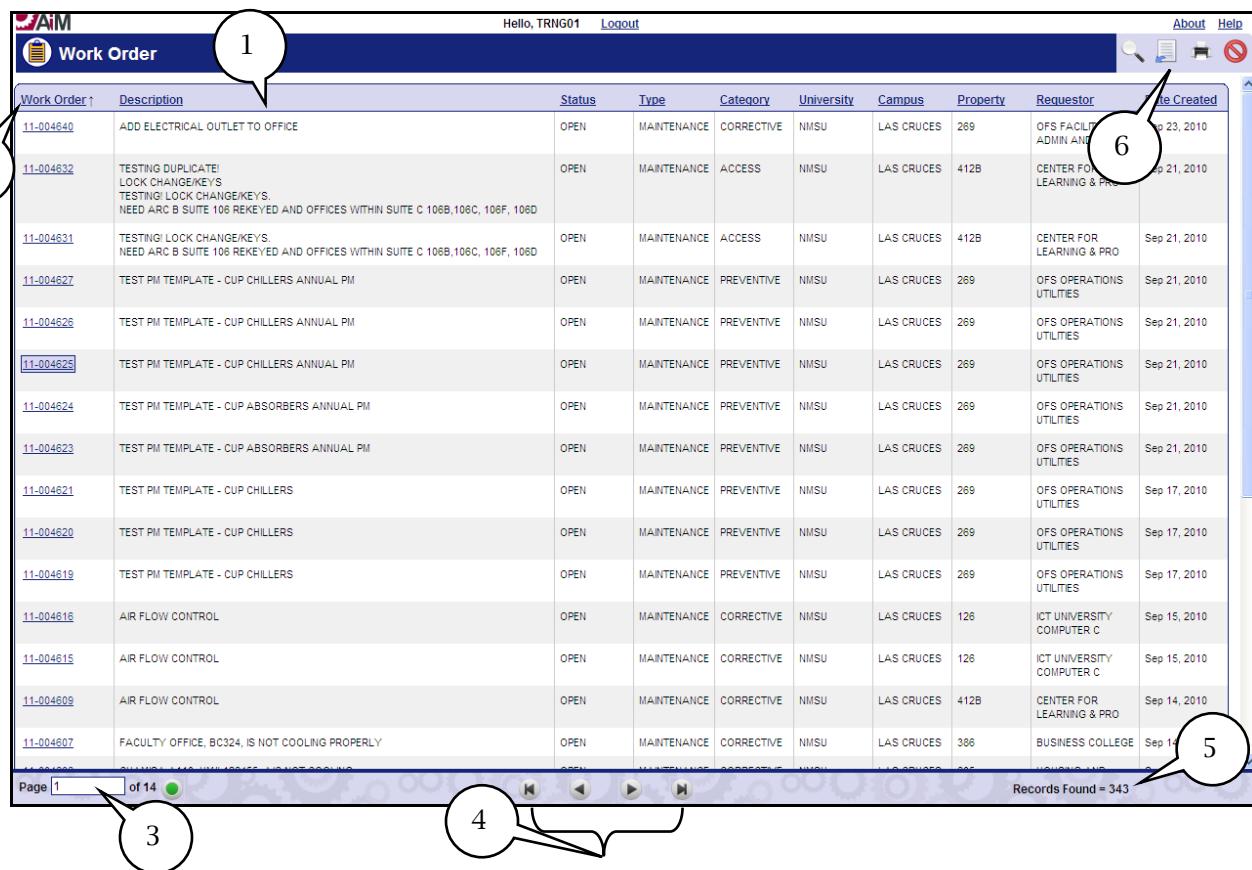
3. Click on the **Search** icon located on the main title bar.
4. The search results will be displayed based on the criteria entered.
5. To perform another query, go back to the *Search* screen (click *Search* icon) and make modifications to run another *Search*.



Team Tip: To return to the *Module* Menu click on the *module* icon to the left of the *Module* title.

Looking at your Search Query Results

With the search results displayed review the screen below.



Work Order	Description	Status	Type	Category	University	Campus	Property	Requestor	Date Created
11-004640	ADD ELECTRICAL OUTLET TO OFFICE	OPEN	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	269	OFS FACILITY ADMIN AND	Sep 23, 2010
11-004632	TESTING DUPLICATE/LOCK CHANGE KEYS/TESTING LOCK CHANGE KEYS/NEED ARC B SUITE 106 REKEYED AND OFFICES WITHIN SUITE C 106B,106C, 106F, 106D	OPEN	MAINTENANCE	ACCESS	NMSU	LAS CRUCES	412B	CENTER FOR LEARNING & PRO	Sep 21, 2010
11-004631	TESTING LOCK CHANGE KEYS/NEED ARC B SUITE 106 REKEYED AND OFFICES WITHIN SUITE C 106B,106C, 106F, 106D	OPEN	MAINTENANCE	ACCESS	NMSU	LAS CRUCES	412B	CENTER FOR LEARNING & PRO	Sep 21, 2010
11-004627	TEST PM TEMPLATE - CUP CHILLERS ANNUAL PM	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 21, 2010
11-004628	TEST PM TEMPLATE - CUP CHILLERS ANNUAL PM	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 21, 2010
11-004629	TEST PM TEMPLATE - CUP CHILLERS ANNUAL PM	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 21, 2010
11-004624	TEST PM TEMPLATE - CUP ABSORBERS ANNUAL PM	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 21, 2010
11-004623	TEST PM TEMPLATE - CUP ABSORBERS ANNUAL PM	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 21, 2010
11-004621	TEST PM TEMPLATE - CUP CHILLERS	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 17, 2010
11-004620	TEST PM TEMPLATE - CUP CHILLERS	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 17, 2010
11-004619	TEST PM TEMPLATE - CUP CHILLERS	OPEN	MAINTENANCE	PREVENTIVE	NMSU	LAS CRUCES	269	OFS OPERATIONS UTILITIES	Sep 17, 2010
11-004618	AIR FLOW CONTROL	OPEN	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	126	ICT UNIVERSITY COMPUTER C	Sep 15, 2010
11-004615	AIR FLOW CONTROL	OPEN	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	126	ICT UNIVERSITY COMPUTER C	Sep 15, 2010
11-004609	AIR FLOW CONTROL	OPEN	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	412B	CENTER FOR LEARNING & PRO	Sep 14, 2010
11-004607	FACULTY OFFICE, BC324, IS NOT COOLING PROPERLY	OPEN	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	386	BUSINESS COLLEGE	Sep 14, 2010

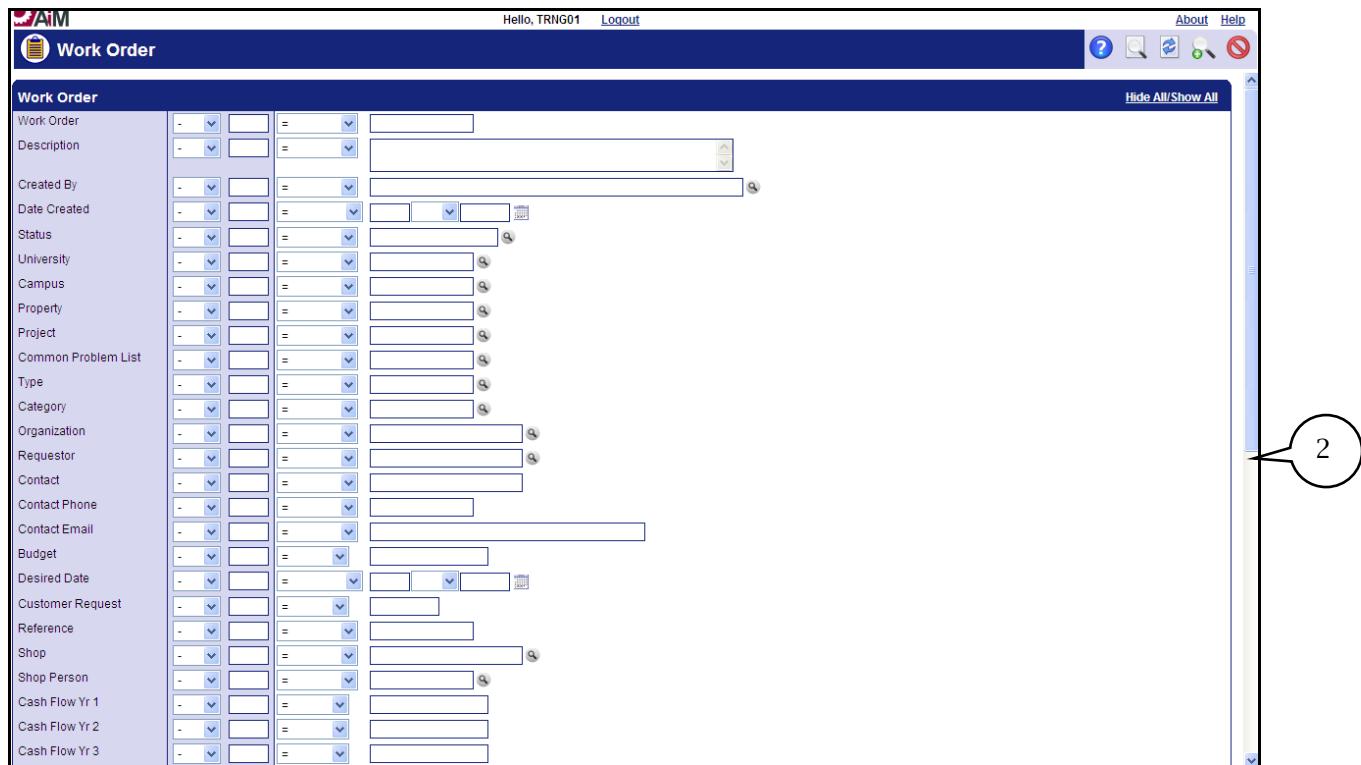
1. Column headings are **Work Order, Description, Status, Type, Category, University, Campus, Property, Requestor** and **Date Created**.
2. Columns can be sorted by clicking on one of the column headings.
3. **Page Navigation** is located at the bottom of the screen. This will represent the number of pages available for review. To go directly to a specific page, enter the page number in the field and click on the green **Go** icon.
4. **Page (DVD) Navigation:** forward/backward icons, and first page/last page icons.
5. **Records Found** identifies the number of records found for the search selection.
6. Icon bar displays the additional available icon options on the screen displayed. By holding your mouse over the icon, it displays the function of the icon.

Create a Personal Query

Personal Queries, that provide *Searches* for information specific to the users, can be created and added to the *WorkDesk* for easy access.

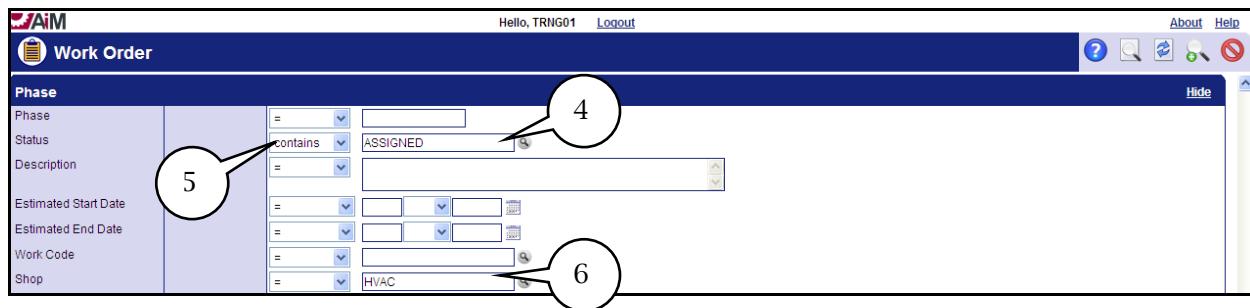
This example creates a *Personal Query* to list all work orders assigned to an employee.

1. First open any *Search* screen and select **Work Order** from the **Work Management Module**.



The screenshot shows the 'Work Order' search screen in the AiM application. The interface includes a header with the AiM logo, user information 'Hello, TRNG01', and a 'Logout' link. Below the header is a toolbar with various icons. The main area is a data grid titled 'Work Order' with numerous columns for filtering. A vertical scroll bar is located on the right side of the grid. A callout bubble with the number '2' points to this scroll bar, indicating where to scroll down to find specific data elements.

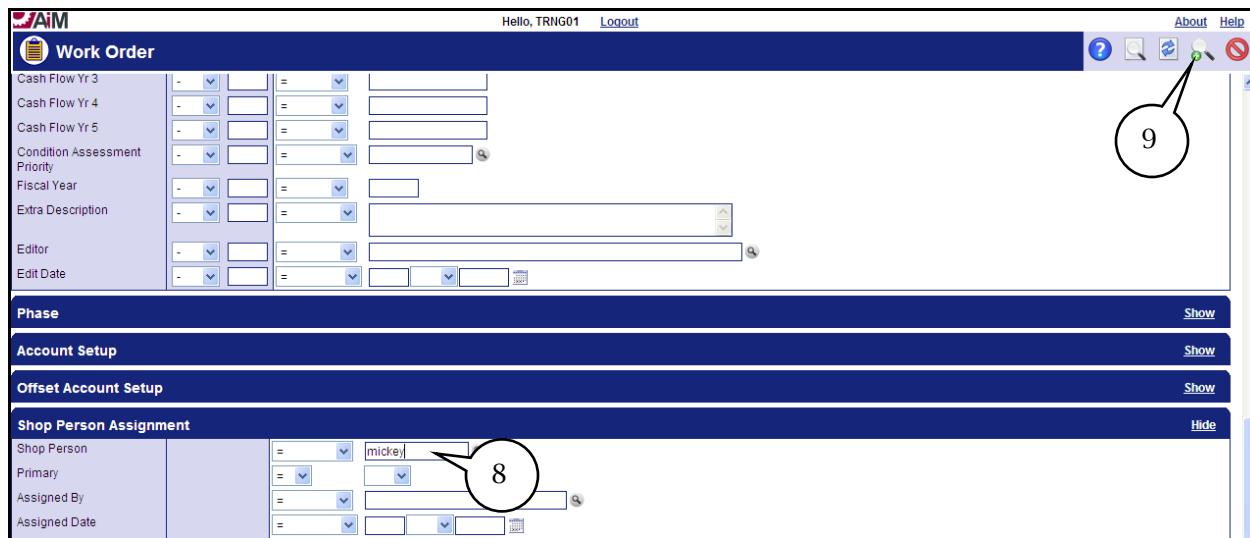
2. While working in the *Search* screen the scroll bar will be available.
3. With the *Search* screen displayed use the scroll bar, moving down, to locate the data elements **Status** and **Shop** under the **Phase** block.



Phase

Phase	=	<input type="text"/>
Status	contains	<input type="text"/> ASSIGNED
Description	=	<input type="text"/>
Estimated Start Date	=	<input type="text"/>
Estimated End Date	=	<input type="text"/>
Work Code	=	<input type="text"/>
Shop	=	<input type="text"/> HVAC

4. Enter **Assigned** in the **Status** field.
5. Select **contains** from the operations field drop down list (click on the down arrow to display operation choices).
6. Enter the name of the shop in the **Shop** field, or click on the **Zoom** icon to select a **Shop**.
7. Scroll down again until you locate the **Shop Person Assignment** block.



Phase

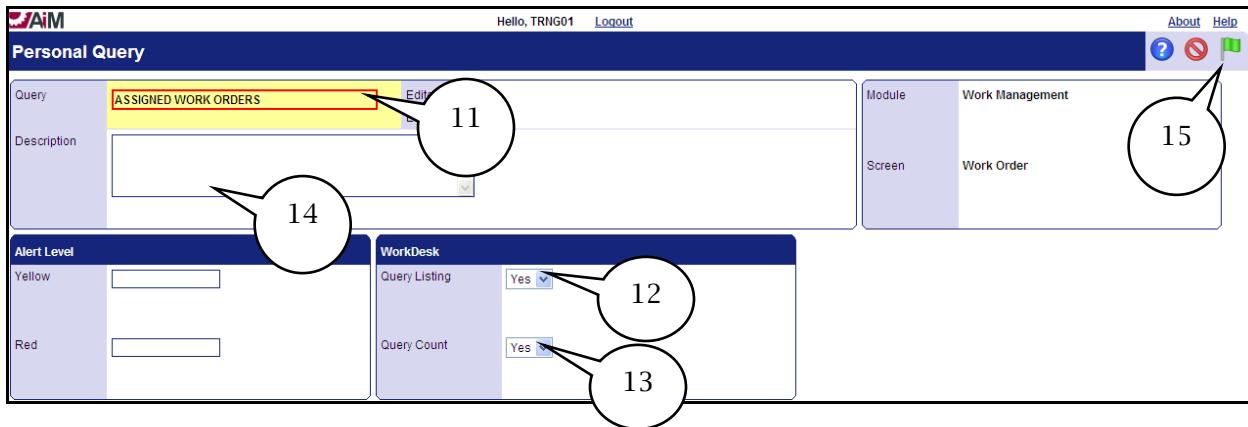
Account Setup

Offset Account Setup

Shop Person Assignment

Shop Person	=	<input type="text"/> micke
Primary	=	<input type="text"/>
Assigned By	=	<input type="text"/>
Assigned Date	=	<input type="text"/>

8. Enter employee **User ID** in the **Shop Person** field box.
9. Click on the **Add Query** icon.
10. The following **Personal Query** screen will be displayed.

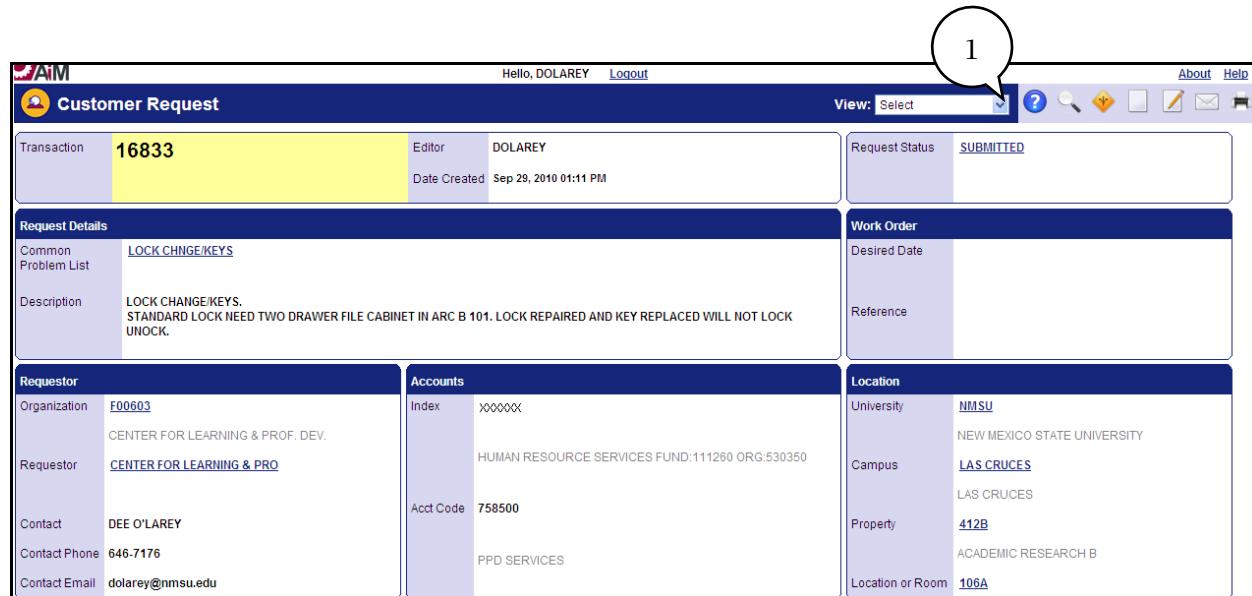


11. Enter a name for the *Personal Query* (e.g. Assigned Work Orders).
12. Click the arrow next to the **Work Desk** field and select **Yes** (results will be displayed in the *Personal Query* list on the *WorkDesk*).
13. Click the arrow next to the **Work Desk Count**, select **Yes**. This will provide a count in front of the work order *Personal Query* on the *WorkDesk*.
14. Though not required, the same information or name given to the *Personal Query* (step 11) can be entered in the **Description** field.
15. When finished click on the **Done** icon to return to the previous *Search* screen.
16. Click on the **Save** icon (not shown) located on the header.
17. Click on the AiM icon (not shown) to return to the *WorkDesk*.

Using Note Logs

When creating a record (*Timecard*, *Customer Requests*, etc.) the *Description* field is often used; however, the number of characters (text) that can be entered is limited, and descriptions can be changed, deleted, etc. After creating and saving a record the *Notes Log*, which is a valuable feature in the AIM application, becomes available. The *Notes Log* is not limited in the number of characters (text) that can be entered and, once entered, becomes a permanent record.

The following screen shot represents a record that has been created and saved in the AiM application. To use the *Notes Log*, complete the following steps.



1

Customer Request

Transaction **16833** Editor **DOLAREY** Date Created **Sep 29, 2010 01:11 PM** Request Status **SUBMITTED**

Request Details

Common Problem List **LOCK CHNGE/KEYS**
Description **LOCK CHANGE/KEYS.
STANDARD LOCK NEED TWO DRAWER FILE CABINET IN ARC B 101. LOCK REPAIRED AND KEY REPLACED WILL NOT LOCK UNLOCK.**

Work Order

Desired Date
Reference

Requestor

Organization **F00603**
CENTER FOR LEARNING & PROF. DEV.
Requestor **CENTER FOR LEARNING & PRO**
Contact **DEE O'LAREY**
Contact Phone **646-7176**
Contact Email **dolarey@nmsu.edu**

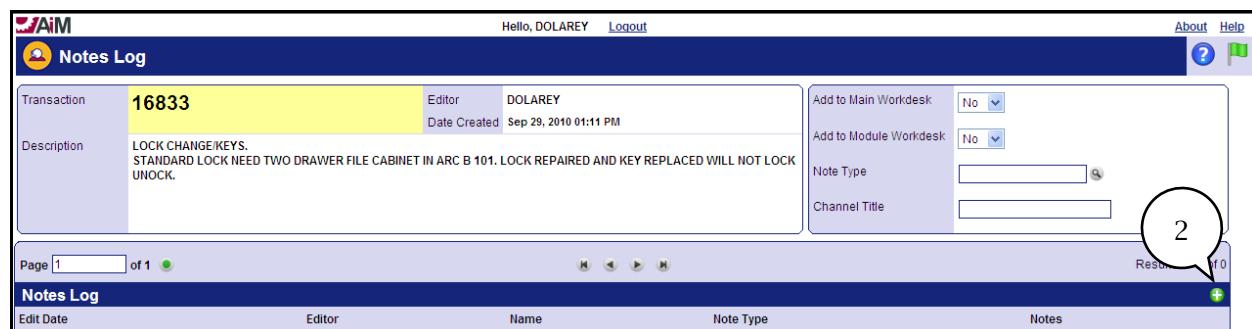
Accounts

Index **XXXXXX**
Acct Code **758500**
HUMAN RESOURCE SERVICES FUND:111260 ORG:530350
PPD SERVICES

Location

University **NMSU**
NEW MEXICO STATE UNIVERSITY
Campus **LAS CRUCES**
LAS CRUCES
Property **412B**
ACADEMIC RESEARCH B
Location or Room **106A**

1. Click on the **View Select** arrow, select **Notes Log** from the drop down list, and the following screen will be displayed.



2

Notes Log

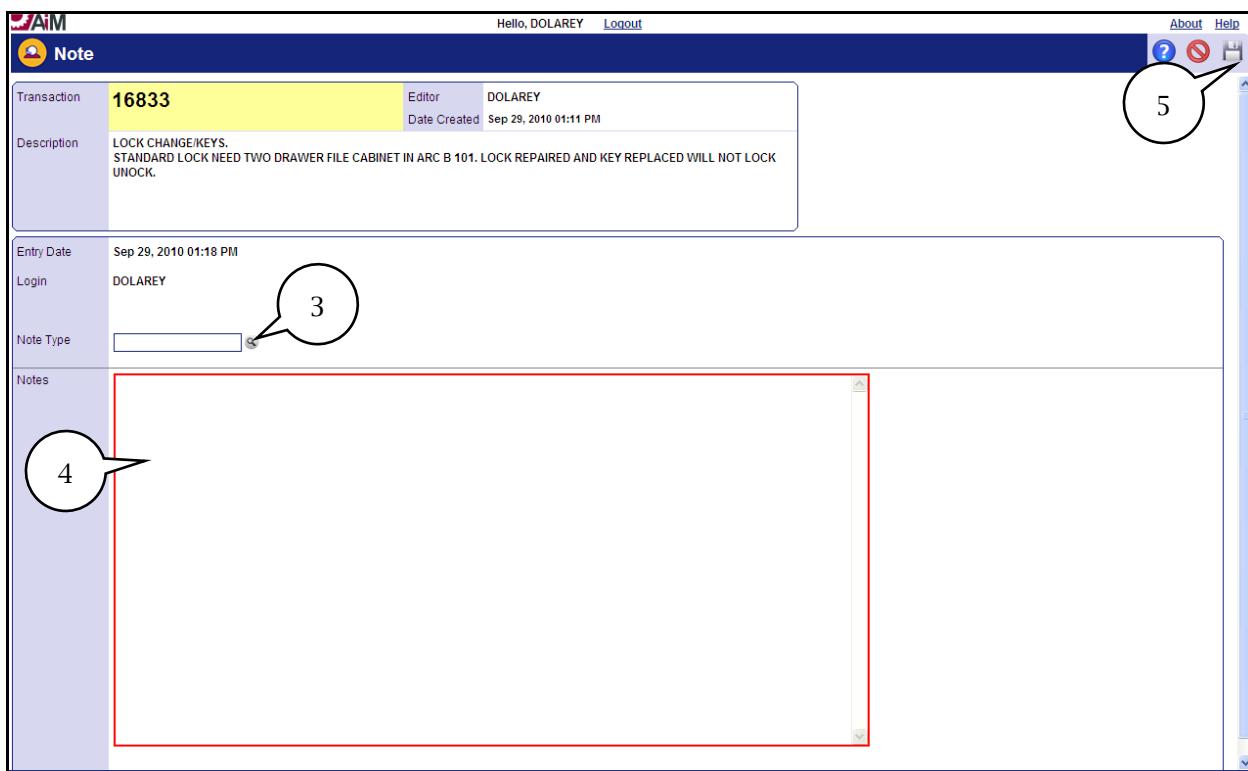
Transaction **16833** Editor **DOLAREY** Date Created **Sep 29, 2010 01:11 PM**

Description **LOCK CHANGE/KEYS.
STANDARD LOCK NEED TWO DRAWER FILE CABINET IN ARC B 101. LOCK REPAIRED AND KEY REPLACED WILL NOT LOCK UNLOCK.**

Add to Main Workdesk **No**
Add to Module Workdesk **No**
Note Type
Channel Title

Page **1** of **1** **1** **2** **3** **4** **5** **6** **7** **8** **9** **10** **11** **12** **13** **14** **15** **16** **17** **18** **19** **20** **21** **22** **23** **24** **25** **26** **27** **28** **29** **30** **31** **32** **33** **34** **35** **36** **37** **38** **39** **40** **41** **42** **43** **44** **45** **46** **47** **48** **49** **50** **51** **52** **53** **54** **55** **56** **57** **58** **59** **60** **61** **62** **63** **64** **65** **66** **67** **68** **69** **70** **71** **72** **73** **74** **75** **76** **77** **78** **79** **80** **81** **82** **83** **84** **85** **86** **87** **88** **89** **90** **91** **92** **93** **94** **95** **96** **97** **98** **99** **100** **101** **102** **103** **104** **105** **106** **107** **108** **109** **110** **111** **112** **113** **114** **115** **116** **117** **118** **119** **120** **121** **122** **123** **124** **125** **126** **127** **128** **129** **130** **131** **132** **133** **134** **135** **136** **137** **138** **139** **140** **141** **142** **143** **144** **145** **146** **147** **148** **149** **150** **151** **152** **153** **154** **155** **156** **157** **158** **159** **160** **161** **162** **163** **164** **165** **166** **167** **168** **169** **170** **171** **172** **173** **174** **175** **176** **177** **178** **179** **180** **181** **182** **183** **184** **185** **186** **187** **188** **189** **190** **191** **192** **193** **194** **195** **196** **197** **198** **199** **200** **201** **202** **203** **204** **205** **206** **207** **208** **209** **210** **211** **212** **213** **214** **215** **216** **217** **218** **219** **220** **221** **222** **223** **224** **225** **226** **227** **228** **229** **230** **231** **232** **233** **234** **235** **236** **237** **238** **239** **240** **241** **242** **243** **244** **245** **246** **247** **248** **249** **250** **251** **252** **253** **254** **255** **256** **257** **258** **259** **260** **261** **262** **263** **264** **265** **266** **267** **268** **269** **270** **271** **272** **273** **274** **275** **276** **277** **278** **279** **280** **281** **282** **283** **284** **285** **286** **287** **288** **289** **290** **291** **292** **293** **294** **295** **296** **297** **298** **299** **300** **301** **302** **303** **304** **305** **306** **307** **308** **309** **310** **311** **312** **313** **314** **315** **316** **317** **318** **319** **320** **321** **322** **323** **324** **325** **326** **327** **328** **329** **330** **331** **332** **333** **334** **335** **336** **337** **338** **339** **340** **341** **342** **343** **344** **345** **346** **347** **348** **349** **350** **351** **352** **353** **354** **355** **356** **357** **358** **359** **360** **361** **362** **363** **364** **365** **366** **367** **368** **369** **370** **371** **372** **373** **374** **375** **376** **377** **378** **379** **380** **381** **382** **383** **384** **385** **386** **387** **388** **389** **390** **391** **392** **393** **394** **395** **396** **397** **398** **399** **400** **401** **402** **403** **404** **405** **406** **407** **408** **409** **410** **411** **412** **413** **414** **415** **416** **417** **418** **419** **420** **421** **422** **423** **424** **425** **426** **427** **428** **429** **430** **431** **432** **433** **434** **435** **436** **437** **438** **439** **440** **441** **442** **443** **444** **445** **446** **447** **448** **449** **450** **451** **452** **453** **454** **455** **456** **457** **458** **459** **460** **461** **462** **463** **464** **465** **466** **467** **468** **469** **470** **471** **472** **473** **474** **475** **476** **477** **478** **479** **480** **481** **482** **483** **484** **485** **486** **487** **488** **489** **490** **491** **492** **493** **494** **495** **496** **497** **498** **499** **500** **501** **502** **503** **504** **505** **506** **507** **508** **509** **510** **511** **512** **513** **514** **515** **516** **517** **518** **519** **520** **521** **522** **523** **524** **525** **526** **527** **528** **529** **530** **531** **532** **533** **534** **535** **536** **537** **538** **539** **540** **541** **542** **543** **544** **545** **546** **547** **548** **549** **550** **551** **552** **553** **554** **555** **556** **557** **558** **559** **560** **561** **562** **563** **564** **565** **566** **567** **568** **569** **570** **571** **572** **573** **574** **575** **576** **577** **578** **579** **580** **581** **582** **583** **584** **585** **586** **587** **588** **589** **590** **591** **592** **593** **594** **595** **596** **597** **598** **599** **600** **601** **602** **603** **604** **605** **606** **607** **608** **609** **610** **611** **612** **613** **614** **615** **616** **617** **618** **619** **620** **621** **622** **623** **624** **625** **626** **627** **628** **629** **630** **631** **632** **633** **634** **635** **636** **637** **638** **639** **640** **641** **642** **643** **644** **645** **646** **647** **648** **649** **650** **651** **652** **653** **654** **655** **656** **657** **658** **659** **660** **661** **662** **663** **664** **665** **666** **667** **668** **669** **670** **671** **672** **673** **674** **675** **676** **677** **678** **679** **680** **681** **682** **683** **684** **685** **686** **687** **688** **689** **690** **691** **692** **693** **694** **695** **696** **697** **698** **699** **700** **701** **702** **703** **704** **705** **706** **707** **708** **709** **710** **711** **712** **713** **714** **715** **716** **717** **718** **719** **720** **721** **722** **723** **724** **725** **726** **727** **728** **729** **730** **731** **732** **733** **734** **735** **736** **737** **738** **739** **740** **741** **742** **743** **744** **745** **746** **747** **748** **749** **750** **751** **752** **753** **754** **755** **756** **757** **758** **759** **760** **761** **762** **763** **764** **765** **766** **767** **768** **769** **770** **771** **772** **773** **774** **775** **776** **777** **778** **779** **780** **781** **782** **783** **784** **785** **786** **787** **788** **789** **790** **791** **792** **793** **794** **795** **796** **797** **798** **799** **800** **801** **802** **803** **804** **805** **806** **807** **808** **809** **810** **811** **812** **813** **814** **815** **816** **817** **818** **819** **820** **821** **822** **823** **824** **825** **826** **827** **828** **829** **830** **831** **832** **833** **834** **835** **836** **837** **838** **839** **840** **841** **842** **843** **844** **845** **846** **847** **848** **849** **850** **851** **852** **853** **854** **855** **856** **857** **858** **859** **860** **861** **862** **863** **864** **865** **866** **867** **868** **869** **870** **871** **872** **873** **874** **875** **876** **877** **878** **879** **880** **881** **882** **883** **884** **885** **886** **887** **888** **889** **890** **891** **892** **893** **894** **895** **896** **897** **898** **899** **900** **901** **902** **903** **904** **905** **906** **907** **908** **909** **910** **911** **912** **913** **914** **915** **916** **917** **918** **919** **920** **921** **922** **923** **924** **925** **926** **927** **928** **929** **930** **931** **932** **933** **934** **935** **936** **937** **938** **939** **940** **941** **942** **943** **944** **945** **946** **947** **948** **949** **950** **951** **952** **953** **954** **955** **956** **957** **958** **959** **960** **961** **962** **963** **964** **965** **966** **967** **968** **969** **970** **971** **972** **973** **974** **975** **976** **977** **978** **979** **980** **981** **982** **983** **984** **985** **986** **987** **988** **989** **990** **991** **992** **993** **994** **995** **996** **997** **998** **999** **1000**

2. Click on the **Add Notes** icon (green plus sign) and the following screen will be displayed.



3. Click on the **Notes Type Zoom** icon and make the appropriate selection. For example, give **AUTHORIZATION** to use a specified index number.
4. Type the desired information in the **Notes** field. This will store the Note with the attached Customer Request.
5. Click on the **Save** icon.

Rapid Timecard Entry

Employee **Timecards** are generated through the process of **Rapid Timecard Entry**. After employees complete the process of entering time, **Timecards** become available for supervisor review and approval. The following **Rapid Timecard Entry** steps must be completed for each day in the pay period.

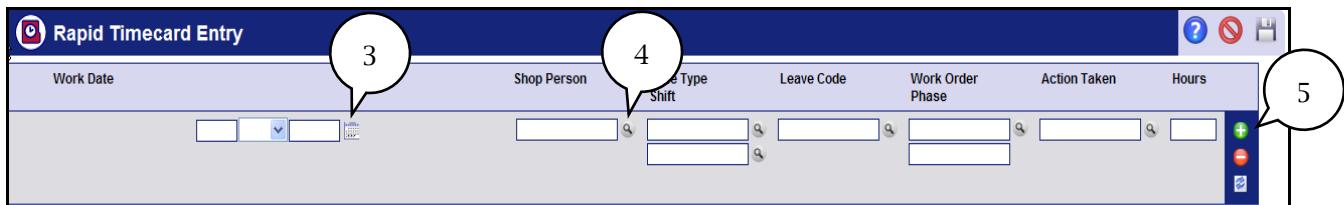
After logging on, the AiM **WorkDesk** will be displayed.



1. Click on **Time Management** and the following screen will be displayed.



2. Click on **Rapid Timecard Entry** and the following screen, used to create default data for subsequent *Line Items*, will be displayed.

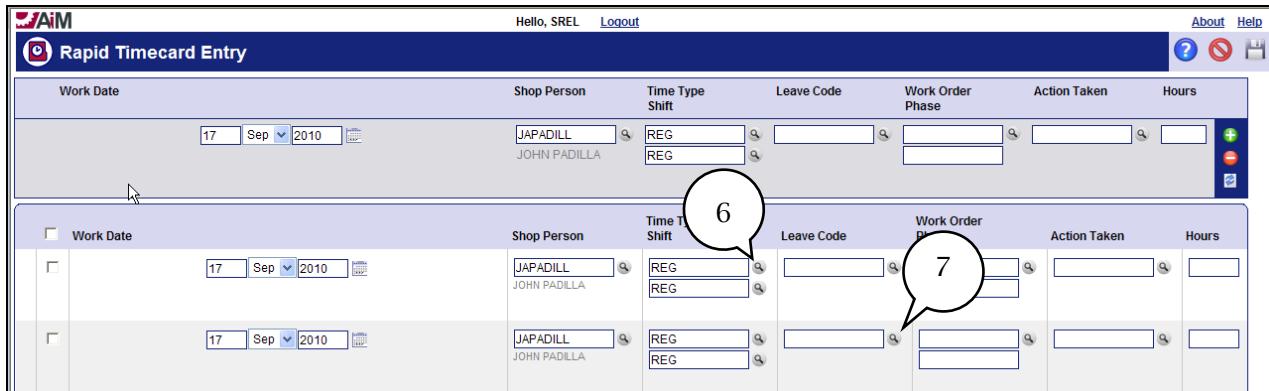


3. Select a **Work Date** by clicking on the calendar icon.
4. Enter employee *Username* in **Shop Person** field then click the **Zoom** icon which will validate the field if the *Username* is correct. Or click on the **Zoom** icon and select the appropriate **Employee ID**, or use the **Search** feature described in the *Search Query* section of this manual.

Note: **Time Type** and **Shift** fields will automatically populate.

5. Click on the **Add Timecard Item** icon once for each *Line Item* that will be entered for the **Work Date** and the following screen will be displayed. For example, if the employee wants to record 4 hours of work on two different **Work Orders** click the **Add Timecard Item** icon twice to create two *Line Items*.

Note: Default data selected in steps 3 & 4 will automatically populate to the added **Timecard Line Items**.



6. Click on the **Zoom** icons if **Time Type** (e.g. overtime, on-call pay, etc.) or **Shift** (e.g. swing or graveyard shift) fields need to be changed.

Note: Any work performed over 8 hours for a **Work Date** (day) will be recorded as overtime.

7. If leave was taken, click on the **Zoom** icon and select the appropriate **Leave Code**.

Note: **Time Type** and **Shift** fields will clear.

Work Date	Shop Person	Time Type Shift	Leave Code	Work Order Phase	Action Taken	Hours
17 Sep 2010	JAPADILL JOHN PADILLA	REG REG				
17 Sep 2010	JAPADILL JOHN PADILLA	REG REG				

8. Enter work order and phase numbers in **Work Order** and **Phase** fields, or click on the **Zoom** icon to use the *Search* feature described in the *Search Query* section.

Note: A *Work Order* is established to record *Administrative* time, and will have a different *Phase* for each calendar month.

9. Enter the hours worked, or leave, for this *Work Date Line Item*. A standard *Work Date* (day) is 8 hours.

Note: Time must be entered in one hour and/or one-quarter hour increments. For example: .5=1/2 hour, 1.0=1 hour, 1.25=1 1/4 hours, 1.5=1 1/2 hours, and 1.75=1 3/4 hours.

10. Repeat steps 8-11 for each *Line Item*. After entering information, the screen will look like the one below.

Work Date	Shop Person	Time Type Shift	Leave Code	Work Order Phase	Action Taken	Hours
17 Sep 2010	JAPADILL JOHN PADILLA					
17 Sep 2010	JAPADILL JOHN PADILLA	REG REG		11-003076 004 PAINTERS PAINT ROOMS	8	
17 Sep 2010	JAPADILL JOHN PADILLA	OT REG		11-003076 004 PAINTERS PAINT ROOMS	1	

11. Review all data entry for accuracy and click on the **Save** icon. The following screen will be displayed and the *Timecard* is now available for supervisor approval.

- 12.

Note: If an employee has not been assigned to a *Work Order Phase*, when the *Rapid Timecard Entry* is saved in Step 11 a screen will be displayed which states, "Shop person not assigned to the phase. Do you want to continue?" Click on the **Yes** icon.

12

Work Date		Shop Person	Time Type Shift	Leave Code	Work Order Phase	Action Taken	Hours
17	Sep 2010	JAPADILL JOHN PADILLA	REG REG		11-003076 004 PAINTERS PAINT ROOMS		8.00
51439	Sep 17, 2010	JAPADILL JOHN PADILLA	OT REG		11-003076 004 PAINTERS PAINT ROOMS		1.00

13. Click on the **Timecard** number and the following **Timecard** screen will be displayed.

13

Transaction		Editor	Status						
51439	SREL	Not Posted							
Description	Edit Date	Sep 21, 2010 11:15 AM							
Shop Person		Total Hours		Total Cost					
Shop Person	JAPADILL JOHN PADILLA	Non-Leave Hours	17.00	Original Cost	\$491.65				
Work Date	Sep 17, 2010	Leave Hours	0.00	Adjusted Cost	\$0.00				
		Total Hours	17.00	Total Cost	\$491.65				
Line Items									
Line	Time Type	Shift	Description	Work Order	Phase	Leave Code	Hours	Line Total	Adj Line
1	REG	REG		11-003076	004		8	\$226.96	
2	REG	REG		11-003076	004		8	\$226.96	
3	OT	REG		11-003076	004		1	\$37.73	

14. Print the **Timecard** by clicking on the **Print** icon and give to the supervisor.



Depending on the work performed on a particular day, more than one **Timecard Line Item** may be required

The Rapid Timecard Entry process is now complete!

Corrections/Changes to a Timecard

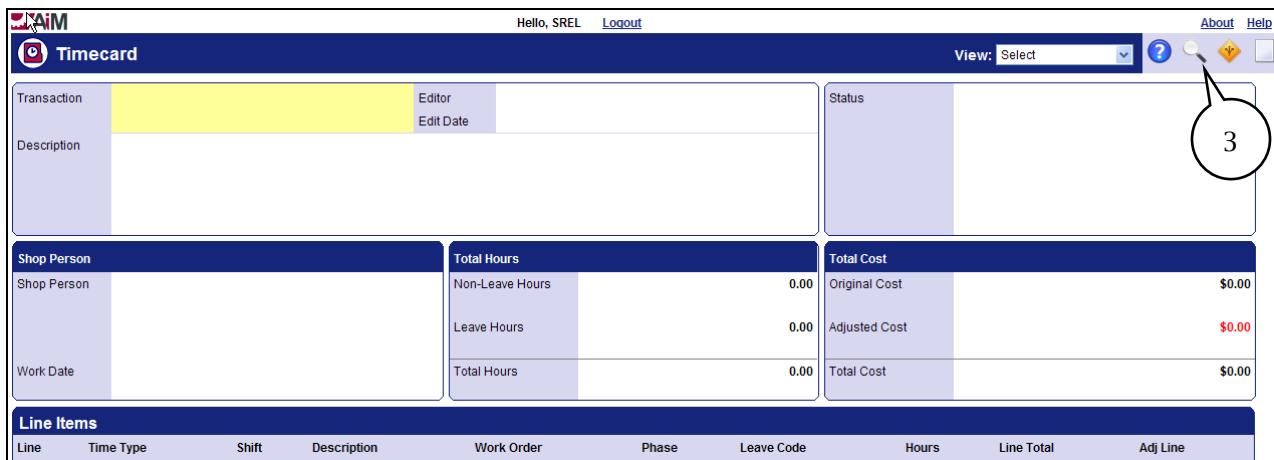
Changes can be made to a *Timecard* as long as it **has not been approved** by the supervisor, after which the supervisor must request a time card adjustment through OFS Human Resources. If a *Timecard* is *Rejected* by the supervisor, employees will have a *Personal Query* link on their AiM *Work Desk* to alert them of *Timecard Rejections*. *Line Items* originally entered through *Rapid Time Entry* can be deleted from the *Timecard* and new *Line Items* can be added.

To make changes to a *Timecard*, the following steps must be completed.

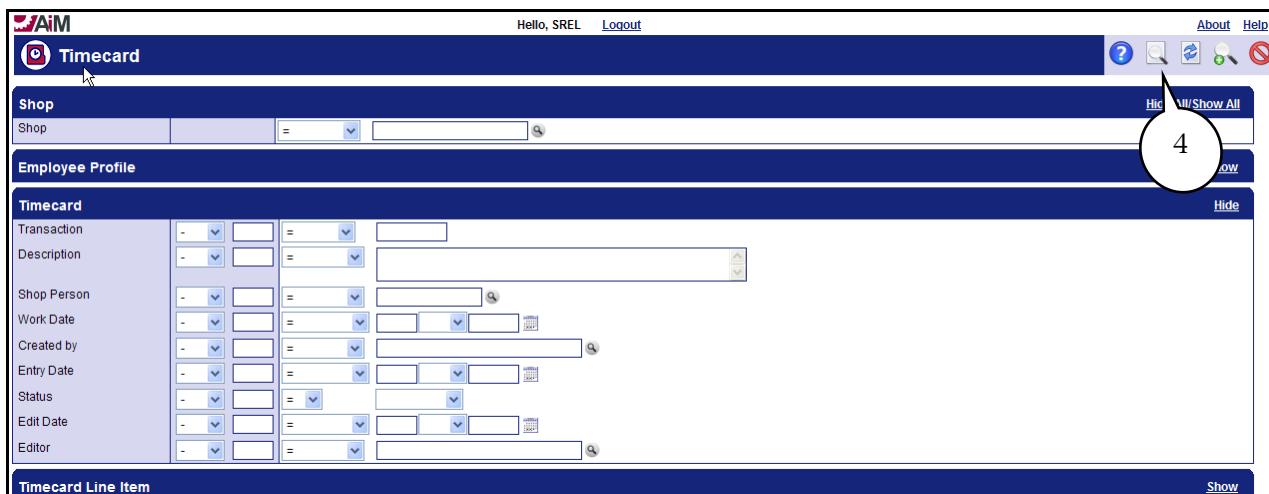
1. Select the **Time Management** module and the following menu will be displayed.



2. Click on **Timecard** and the following screen will be displayed.



3. To locate the *Timecard* that needs to be changed, click on the **Search** icon and the following screen will be displayed. Or use the *Search* feature as described in the *Search Query* section.



AIM
Timecard

Hello, SREL Logout

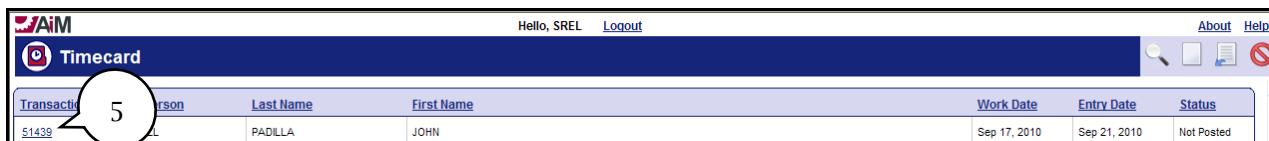
Shop Employee Profile

Timecard

Transaction
Description
Shop Person
Work Date
Created by
Entry Date
Status
Edit Date
Editor

Timecard Line Item Show

4. Click on the **Execute Search** icon and the following screen will be displayed.



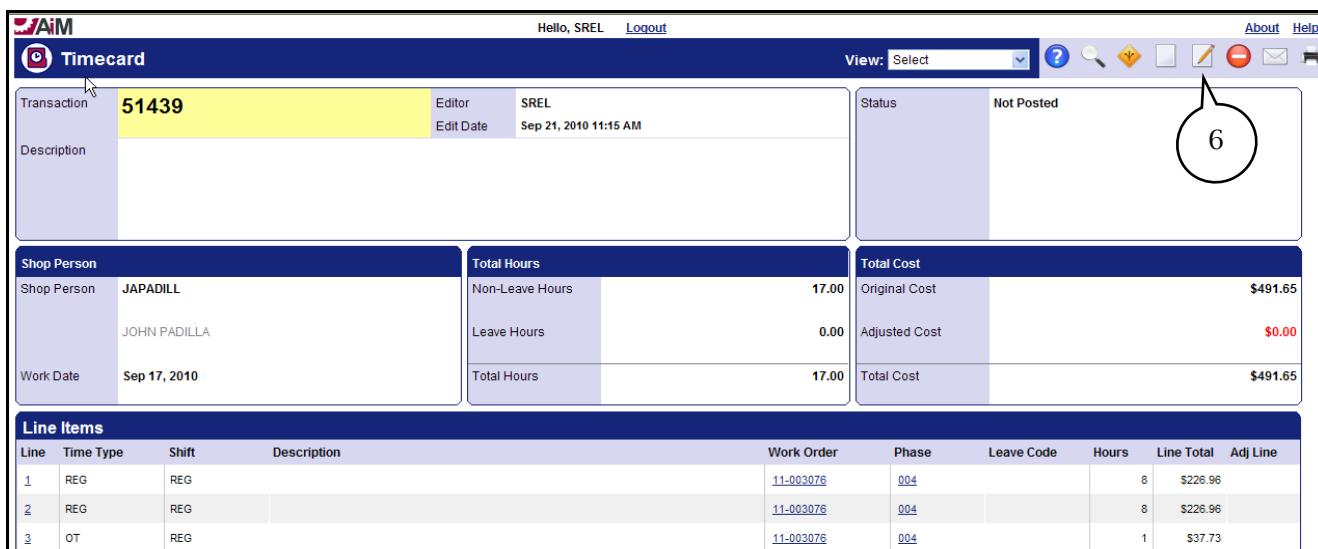
AIM
Timecard

Hello, SREL Logout

Transaction Person Last Name First Name Work Date Entry Date Status

51439 JAPADILL PADILLA JOHN Sep 17, 2010 Sep 21, 2010 Not Posted

5. Select the **Transaction number (Timecard)**, associated with the **Shop Person** and **Work Date**, that needs to be changed and the following screen will be displayed.



AIM
Timecard

Hello, SREL Logout

View: Select

Transaction 51439 Editor SREL
Description Edit Date Sep 21, 2010 11:15 AM

Status Not Posted

Shop Person Total Hours Total Cost

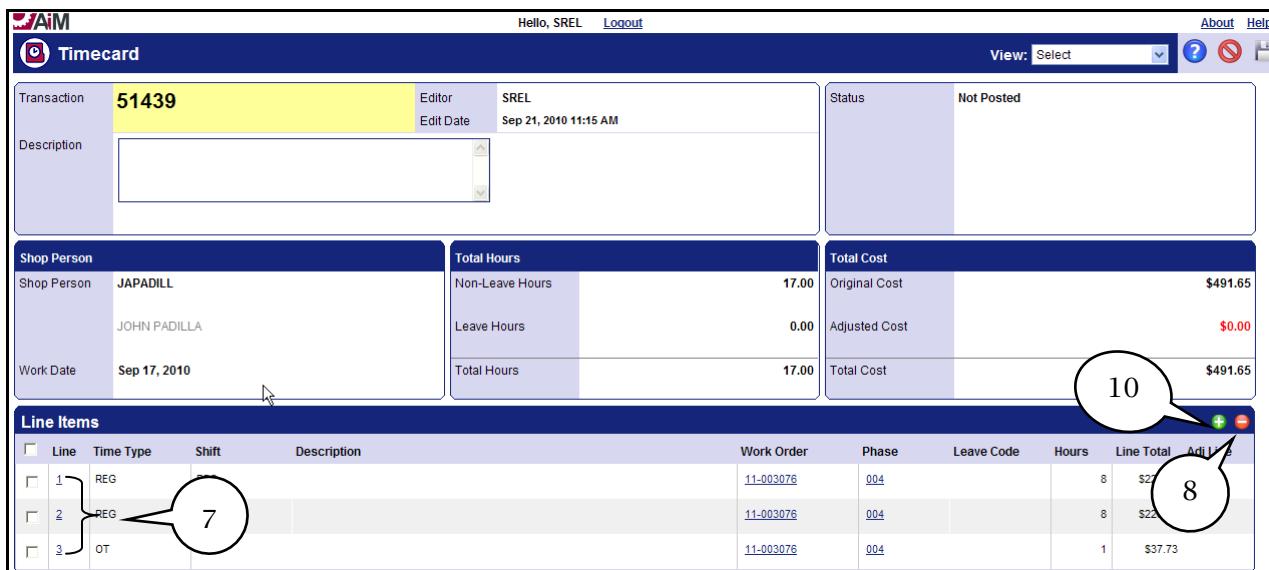
Shop Person JAPADILL Non-Leave Hours 17.00
Description JOHN PADILLA Leave Hours 0.00
Work Date Sep 17, 2010 Total Hours 17.00

Total Cost
Original Cost \$491.65
Adjusted Cost \$0.00
Total Cost \$491.65

Line Items

Line	Time Type	Shift	Description	Work Order	Phase	Leave Code	Hours	Line Total	Adj Line
1	REG	REG		11-003076	004		8	\$226.96	
2	REG	REG		11-003076	004		8	\$226.96	
3	OT	REG		11-003076	004		1	\$37.73	

6. Click on the **Edit** icon and the following screen will be displayed.



7. To delete a **Line Item**, click on the box to the left of the **Line** number and a check mark will appear in the box.
8. Click on the **Delete Timecard Item** (red subtraction sign) icon and the following screen will be displayed.



9. Click on the **YES** icon (green check mark) to delete the **Line Item** or the **NO** (red "X") icon if a **Line Item** has been selected in error. Repeat steps 7-9 if additional **Line Items** need to be deleted.
10. To add new **Line Items** click on the **Add Timecard Item** icon (green plus sign) and the following screen will be displayed. If no new **Line Items** are needed, go to step 18.

11. Enter a **Description** (optional).
12. Enter work order and phase numbers in **Work Order** and **Phase** fields, or click on the **Zoom** icon to use the *Search* feature described in the *Search Query* section.
13. Click on the **Zoom** icons if **Time Type** (e.g. overtime, on-call pay, etc.) and **Shift** (e.g. swing or graveyard) fields need to be changed.
14. If leave was taken, click on the **Zoom** icon and select the appropriate **Leave Code**.
15. Enter the hours worked, or leave, for this *Work Date Line Item*.
16. Click on the **Done** icon. Repeat steps 10-16 if additional *Line Items* need to be added.
17. After clicking on the **Done** icon, the following screen will be displayed.

18. Click on the **Save** icon and the following screen will be displayed.

Shop Person		Total Hours		Total Cost																															
Shop Person	JAPADILL	Non-Leave Hours	26.00	Original Cost	\$756.34																														
	JOHN PADILLA	Leave Hours	2.00	Adjusted Cost	\$0.00																														
Work Date	Sep 17, 2010	Total Hours	28.00	Total Cost	\$756.34																														
Line Items <table border="1"> <thead> <tr> <th>Line</th> <th>Time Type</th> <th>Shift</th> <th>Description</th> <th>Work Order</th> <th>Phase</th> <th>Leave Code</th> <th>Hours</th> <th>Line Total</th> <th>Adj Line</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>REG</td> <td>REG</td> <td></td> <td>11-003076</td> <td>004</td> <td></td> <td>8</td> <td>\$226.96</td> <td></td> </tr> <tr> <td>2</td> <td>REG</td> <td>REG</td> <td></td> <td>11-003076</td> <td>004</td> <td></td> <td>8</td> <td>\$226.96</td> <td></td> </tr> </tbody> </table>						Line	Time Type	Shift	Description	Work Order	Phase	Leave Code	Hours	Line Total	Adj Line	1	REG	REG		11-003076	004		8	\$226.96		2	REG	REG		11-003076	004		8	\$226.96	
Line	Time Type	Shift	Description	Work Order	Phase	Leave Code	Hours	Line Total	Adj Line																										
1	REG	REG		11-003076	004		8	\$226.96																											
2	REG	REG		11-003076	004		8	\$226.96																											

19. Print the corrected **Timecard** by clicking on the **Print** icon and give to the supervisor.



Corrections/Changes can be made to **Timecards** any time prior to supervisory **Approval/Rejection** by following the previous steps.

The Corrections/Changes to a Timecard process is now complete!

Adding Descriptions to Timecards

When entering time through **Rapid Timecard Entry**, descriptions cannot be provided for **Line Items** entered; however, descriptions can be added by going to the employee **Timecard** and completing the following steps.

1. Select a **Timecard** and the following screen will be displayed.

Transaction	51439	Editor	SREL	Status		Not Posted			
Description			Edit Date	Sep 21, 2010 11:15 AM					
Shop Person			Total Hours		Total Cost				
Shop Person	JAPADILL	Non-Leave Hours	26.00	Original Cost	\$756.34				
	JOHN PADILLA	Leave Hours	2.00	Adjusted Cost	\$0.00				
Work Date	Sep 17, 2010	Total Hours	28.00	Total Cost	\$756.34				
Line Items									
Line	Time Type	Shift	Description	Work Order	Phase	Leave Code	Hours	Line Total	Adj Line
1	REG	REG		11-003076	004		8	\$226.96	
2	REG	REG		11-003076	004		8	\$226.96	

2. Click on the **Edit** icon and the following screen will be displayed.

Transaction	51439	Editor	SREL	Status		Not Posted			
Description			Edit Date	Sep 21, 2010 11:15 AM					
Shop Person			Total Hours		Total Cost				
Shop Person	JAPADILL	Non-Leave Hours	26.00	Original Cost	\$756.34				
	JOHN PADILLA	Leave Hours	2.00	Adjusted Cost	\$0.00				
Work Date	Sep 17, 2010	Total Hours	28.00	Total Cost	\$756.34				
Line Items									
Line	Time Type	Shift	Description	Work Order	Phase	Leave Code	Hours	Line Total	Adj Line
1	REG	REG		11-003076	004		8	\$226.96	
2	REG	REG		11-003076	004		8	\$226.96	

3. Click on the **Line Item** number that needs a description and the following screen will be displayed.

Line **1** Editor SREL
Edit Date Sep 21, 2010 02:50 PM

Description

Shop Person
Shop Person JAPADILL
JOHN PADILLA
Work Date Sep 17, 2010

Labor Rate
Time Type REG
REGULAR STAFF EARNINGS
Shift REG
REGULAR NONEXEMPT
Labor Rate \$28.37

Line Totals
Hours 8.00
Line Total \$226.96

Work Order
Work Order 11-003076
COMPLETE DEFERRED MAINTENENCE, OPEN TO CARPENTERS.
Phase 004
PAINTERS PAINT ROOMS
Action Taken

Leave
Leave Code

Timecard Totals
Non-Leave Hours 26.00
Leave Hours 2.00
Total Hours 28.00

4. Type a description in the **Description** field.
5. Click on the **Done** icon and the following screen will be displayed. Repeat steps 3-5 as needed.

Transaction **51439** Editor SREL
Edit Date Sep 21, 2010 11:15 AM

Description

Shop Person
Shop Person JAPADILL
JOHN PADILLA
Work Date Sep 17, 2010

Total Hours
Non-Leave Hours 26.00
Leave Hours 2.00
Total Hours 28.00

Total Cost
Original Cost \$756.34
Adjusted Cost \$0.00
Total Cost \$756.34

Line Items

Line	Time Type	Shift	Description	Work Order	Phase	Leave Code	Hours	Line Total	Adj Line
<input type="checkbox"/> 1	REG	REG		11-003076	004		8.00	\$226.96	
<input type="checkbox"/> 2	REG	REG		11-003076	004		8	\$226.96	

6. Click on the **Save** icon and the following screen will be displayed.

Timecard

Transaction 51439 Editor SREL
Edit Date Sep 21, 2010 11:15 AM

Description

Status Not Posted

Shop Person

Shop Person JAPADILL
JOHN PADILLA

Work Date Sep 17, 2010

Total Hours

Non-Leave Hours	26.00
Leave Hours	2.00
Total Hours	28.00

Total Cost

Original Cost	\$756.34
Adjusted Cost	\$0.00
Total Cost	\$756.34

Line Items

Line	Time Type	Shift	Description	Work Order	Phase	Leave Code	Hours	Line Total	Adj Line
1	REG	REG		11-003076	004		8	\$226.96	
2	REG	REG		11-003076	004		8	\$226.96	

7. Click on the **Print** icon to print the *Timecard*.

The Adding Descriptions to Timecards process is now complete!

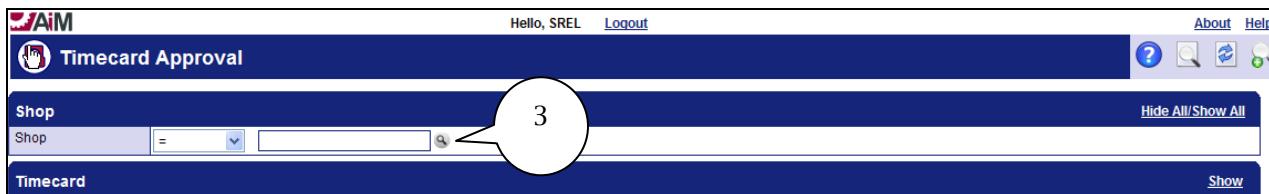
Timecard Approval

After employees have entered their time through *Rapid Time Entry*, *Timecards* must be reviewed by the supervisor for approval, or rejection if the employee needs to make corrections to the *Timecard*, by completing the following steps.

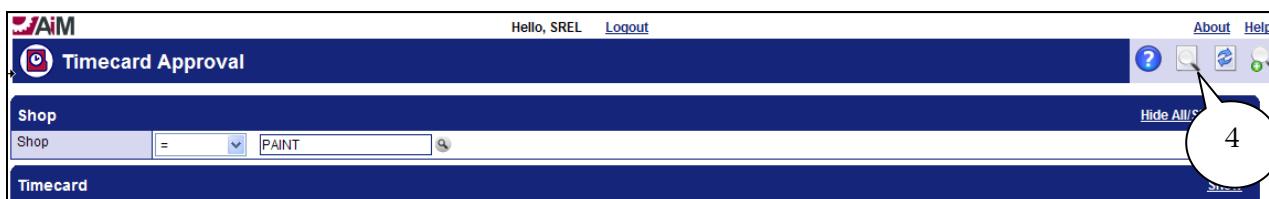
1. Select the **Time Management** module and the following will be displayed.



2. Click on **Timecard Approval** and the following screen will be displayed.



3. Click on the **Shop Zoom** icon to conduct a *Search of Timecards* waiting for approval, select the appropriate **Shop**, and the following screen will be displayed.



4. Click on the **Execute Search** icon, or use the *Search* feature described in the *Performing a Search Query* section to narrow the *Search* to a specific **Shop**, and the following screen will be displayed.

Timecard Approval

Select All [Less Detail](#) | [More Detail](#)

<input type="checkbox"/> Shop Person AVARELA Name HECTOR VARELA	Total Days 1 Total Hours 8.00
<input type="checkbox"/> Shop Person CZAP Name ISAAC PAZ	Total Days 1 Total Hours 8.00
<input type="checkbox"/> Shop Person JAPADILL Name JOHN PADILLA	Total Days 2 Total Hours 39.50
<input type="checkbox"/> Shop Person RLIMON Name RANDALL LIMON	Total Days 1 Total Hours 8.00
<input type="checkbox"/> Shop Person RMADERO Name RUBEN MADERO	Total Days 1 Total Hours 8.00
<input type="checkbox"/> Shop Person TONYM Name ANTHONY MONTES	Total Days 1 Total Hours 8.00

5. Click on the **More Detail** link and the following screen will be displayed.

Timecard Approval

Select All [Less Detail](#) | [More Detail](#)

<input type="checkbox"/> Shop Person AVARELA Name HECTOR VARELA	Total Days 1 Total Hours 8.00																		
<table border="1"> <thead> <tr> <th>Work Date</th> <th>Transaction</th> <th>Non-Leave Hours</th> <th>Leave Hours</th> <th>Total Hours</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> 08/23/2010</td> <td>51390</td> <td>0.00</td> <td>8.00</td> <td></td> </tr> </tbody> </table>					Work Date	Transaction	Non-Leave Hours	Leave Hours	Total Hours	<input type="checkbox"/> 08/23/2010	51390	0.00	8.00						
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<input type="checkbox"/> 09/17/2010	51439	26.00	2.00	28.00															
<input type="checkbox"/> 09/30/2010	51442	11.50	0.00	11.50															

6. To review the employee's **Timecard**, click on the **Work Date Transaction** number and the following **Timecard** will be displayed.

Timecard

Transaction	51442	Editor	SREL																																									
Description	Edit Date Sep 24, 2010 04:25 PM																																											
		Status	Not Posted																																									
Shop Person Shop Person JAPADILL JOHN PADILLA Work Date Sep 30, 2010		Total Hours Non-Leave Hours 11.50 Leave Hours 0.00 Total Hours 11.50	Total Cost Original Cost \$359.02 Adjusted Cost \$0.00 Total Cost \$359.02																																									
Line Items <table border="1"> <thead> <tr> <th>Line</th> <th>Time Type</th> <th>Shift</th> <th>Description</th> <th>Work Order</th> <th>Phase</th> <th>Leave Code</th> <th>Hours</th> <th>Line Total</th> <th>Adj Line</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>REG</td> <td>REG</td> <td>ASSIGNED NEW PROJECT</td> <td>11-003076</td> <td>004</td> <td></td> <td>8</td> <td>\$226.96</td> <td></td> </tr> <tr> <td>2</td> <td>OT</td> <td>REG</td> <td></td> <td>11-003076</td> <td>004</td> <td></td> <td>1.5</td> <td>\$56.60</td> <td></td> </tr> <tr> <td>3</td> <td>OT</td> <td>REG</td> <td>LEAVE WITHOUT PAY</td> <td>11-003076</td> <td>004</td> <td></td> <td>2</td> <td>\$75.46</td> <td></td> </tr> </tbody> </table>					Line	Time Type	Shift	Description	Work Order	Phase	Leave Code	Hours	Line Total	Adj Line	1	REG	REG	ASSIGNED NEW PROJECT	11-003076	004		8	\$226.96		2	OT	REG		11-003076	004		1.5	\$56.60		3	OT	REG	LEAVE WITHOUT PAY	11-003076	004		2	\$75.46	
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3	OT	REG	LEAVE WITHOUT PAY	11-003076	004		2	\$75.46																																				

7. After reviewing the *Timecard*, click on the **Done** icon and the *Timecard Approval* screen will be reappear. Repeat steps 6 and 7 to review additional *Timecards*.

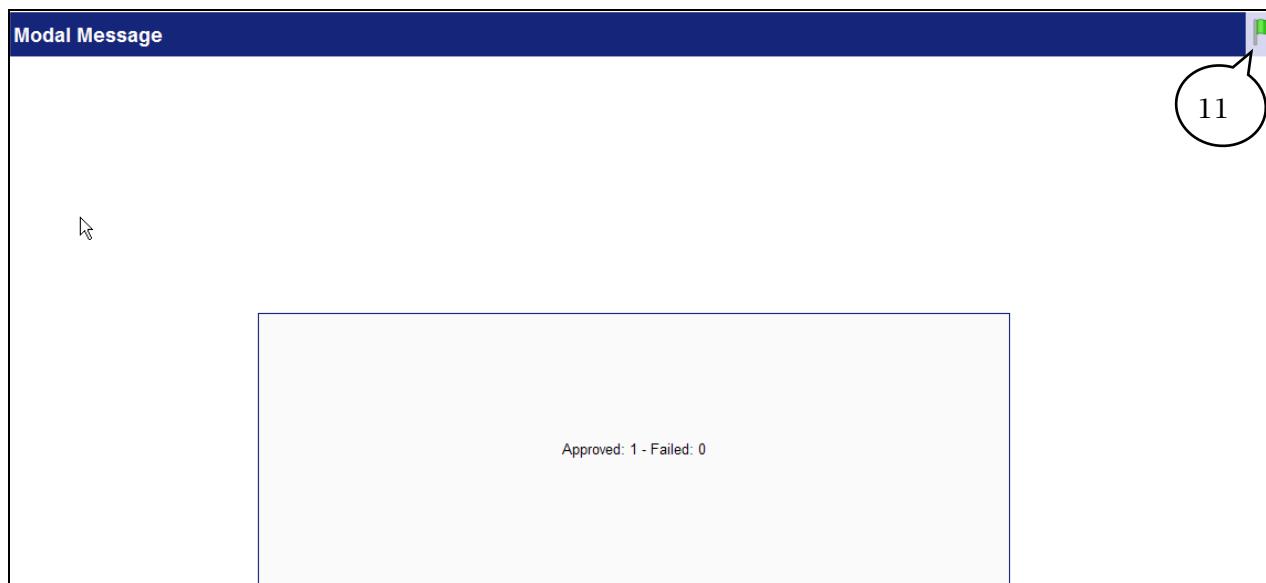
Timecard Approval

<input type="checkbox"/> Shop Person AVARELA	Name HECTOR VARELA				Total Days 1	Total Hours 8.00	
Work Date		Transaction	Non-Leave Hours	Leave Hours	Total Hours		
<input type="checkbox"/> 08/23/2010		51390	8.00	0.00	8.00		
<input type="checkbox"/> Shop Person		Name ISAAC PAZ				Total Days 1	Total Hours 8.00
Work Date		Transaction	Non-Leave Hours	Leave Hours	Total Hours		
<input type="checkbox"/> 08/23/2010		51394	8.00	0.00	8.00		
<input type="checkbox"/> Shop Person JAPADILL		Name JOHN PADILLA				Total Days 2	Total Hours 39.50
Work Date		Transaction	Non-Leave Hours	Leave Hours	Total Hours		
<input type="checkbox"/> 09/17/2010		51439	26.00	2.00	28.00		
<input checked="" type="checkbox"/> 09/30/2010		51442	11.50	0.00	11.50		

8. To *Approve* or *Reject* a *Timecard* for a **Shop Person**, click on the box next to the **Work Date** and a check mark will appear in the box.

9. More than one *Timecard* can be selected (step 8), or all *Timecards* waiting for approval can be selected, as long as they require the same action (approval or rejection), by clicking on the box next to the **Shop Person** name.

10. Click on the **Approve** icon, or if changes need to be made by the employee, click on the **Reject** icon. The following screen, in this case showing a *Timecard* was approved, will be displayed.



11. Click on the **Done** icon. Repeat 6-11 to *Approve/Reject* additional *Timecards*.

Note: Employees should create a *Personal Query* link on their AiM *Work Desk* to alert them of *Timecard Rejections*.

The Timecard Approval process is now complete!

Material Requests

All materials (*Parts*) used to complete *Work Orders* must be recorded through *Material Requests*. Materials are obtained either through the OFS main warehouse or a shop warehouse.

Note: When processing a Material Request a Part # or Part name will be required. Consider performing a search before starting to create the Material Request. This can be completed by going to the *Inventory Module* and clicking on the *Search* icon next to the *Inventory Part Profile*. With the *Search* screen displayed, click on the *Zoom* icon on the *Class*, select the desired *Class* and *execute search*. This will expedite the process.

The followings steps must be completed to request materials.

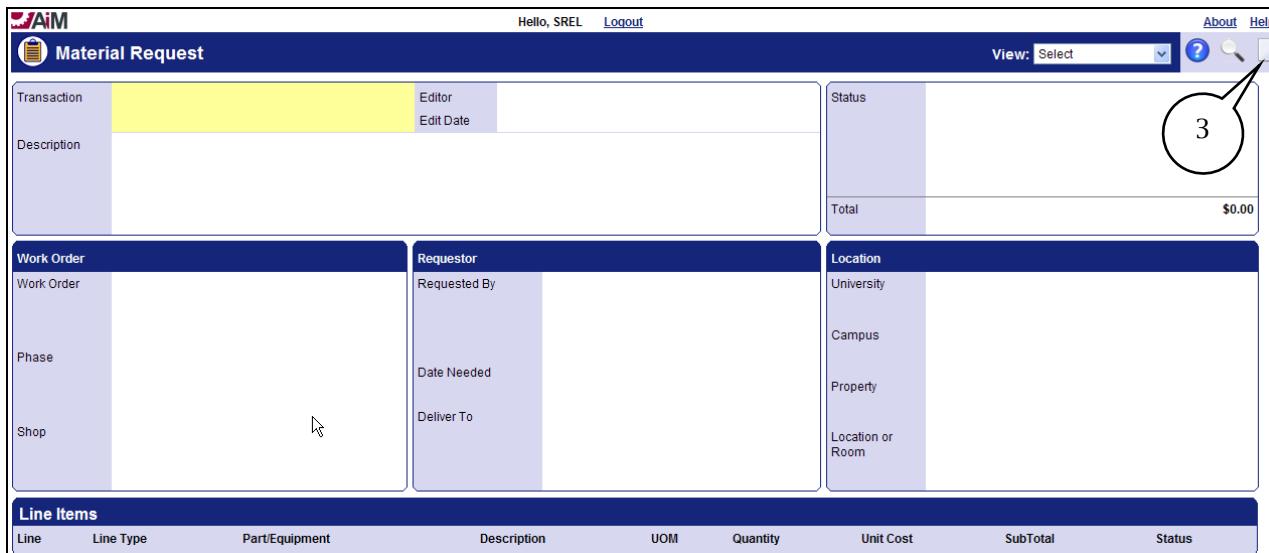
After logging on the AiM **WorkDesk** will be displayed.



1. Click on **Work Management** and the following screen will be displayed.

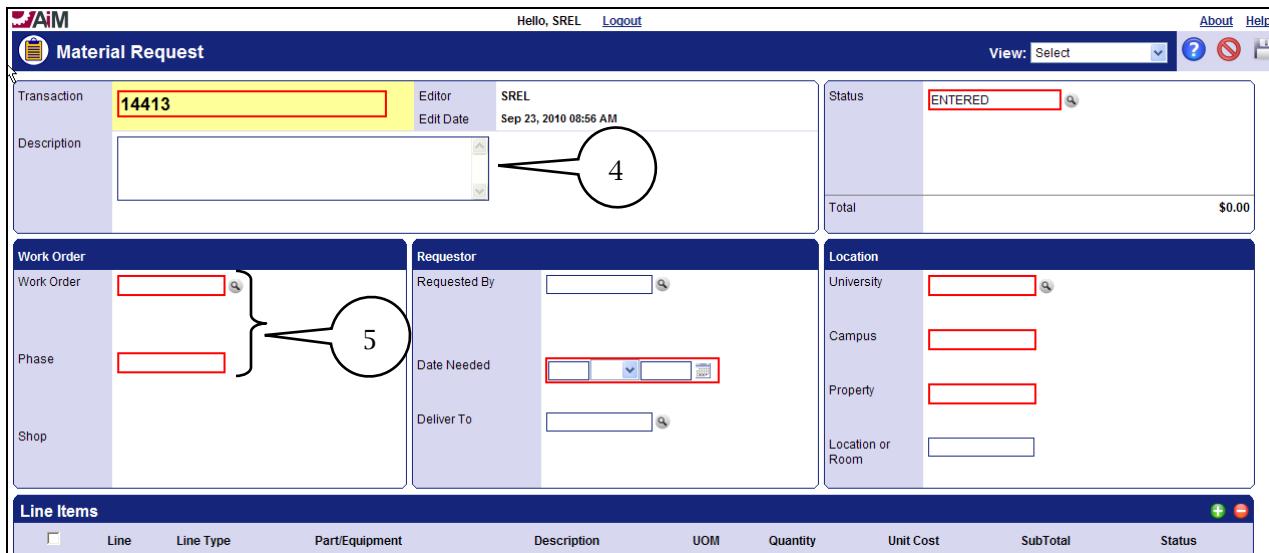


2. Click on **Material Request** and the following screen will be displayed.



This screenshot shows the 'Material Request' screen in the AiM application. The top navigation bar includes 'Hello, SREL' and 'Logout'. A 'View' dropdown is set to 'Select'. The main form has sections for 'Transaction' (with 'Editor' and 'Edit Date' buttons), 'Description', 'Status' (showing '3'), 'Total (\$0.00)', 'Work Order' (with 'Work Order' and 'Phase' fields), 'Requestor' (with 'Requested By', 'Date Needed', and 'Deliver To' fields), and 'Location' (with 'University', 'Campus', 'Property', and 'Location or Room' dropdowns). A 'Line Items' table at the bottom has columns for Line, Line Type, Part/Equipment, Description, UOM, Quantity, Unit Cost, SubTotal, and Status.

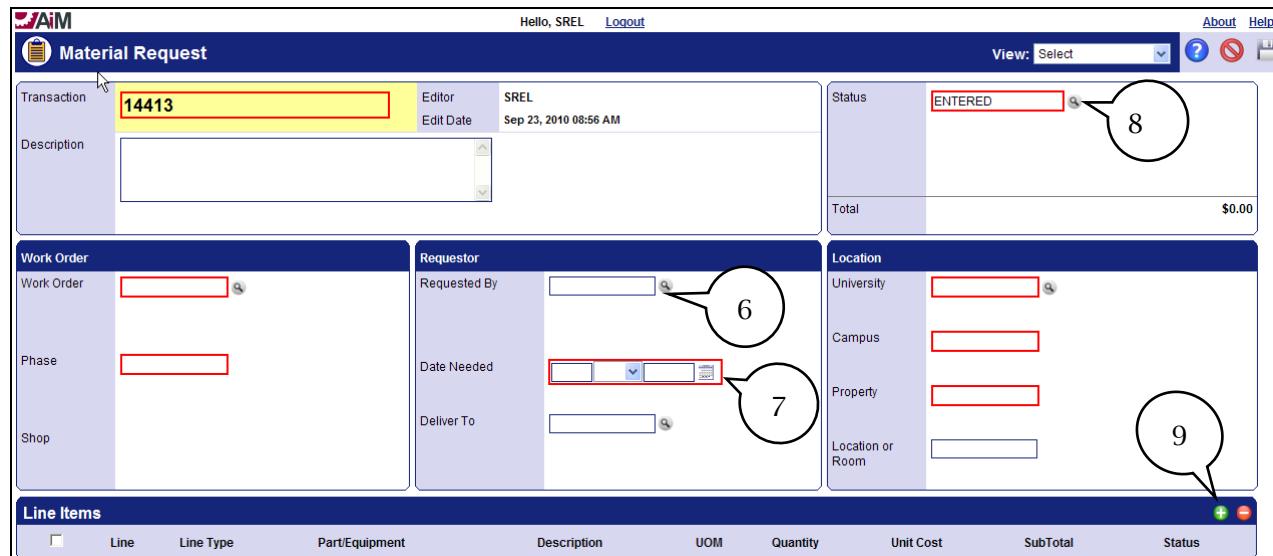
3. Click on the **New** icon and the following screen will be displayed.



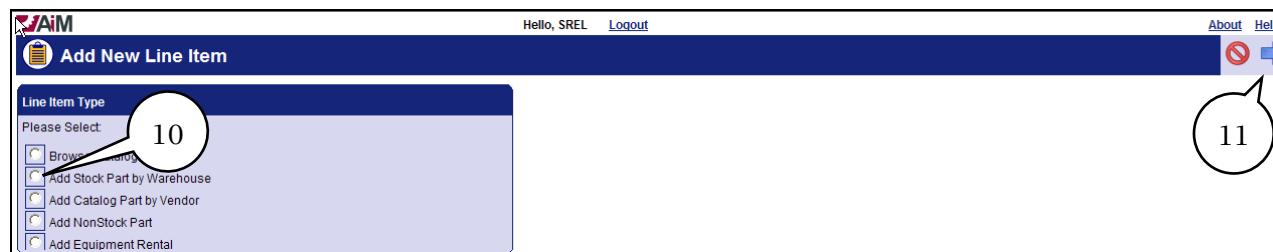
This screenshot shows the 'Material Request' screen with a status of '4'. The 'Work Order' and 'Phase' fields are highlighted with red boxes. A large circle with the number '5' is drawn over the 'Search' icon in the 'Requestor' section. The rest of the screen is similar to the previous one, with sections for Transaction, Description, Status, Work Order, Requestor, Location, and Line Items.

- Type in a description of the materials being requested, and the purpose/reason for the request in the **Description** field.
- Enter work order and phase in **Work Order** and **Phase** fields, or click on the **Zoom** icon to use the *Search* feature described in the *Search Query* section.

Note: The *Location* block fields will automatically populate after selecting a *Work Order* and *Phase*.



6. Enter employee **Username** in the **Requested By** field then click the **Zoom** icon which will populate the **Requested By** and **Deliver To** fields if the **Username** is correct. Or Click on **Zoom** icon and select the **Shop Person** requesting the material.
7. Click on the calendar icon to select the **Date Needed**.
8. **Status** field should default to *Entered*. If not, click on **Zoom** icon and select **Entered** from the **Status** column.
9. Click on the **Add Line Item** icon and the following drop down list will be displayed.



10. Click on **Add Stock Part by Warehouse** radio button.

Note: Do not ever select *Add NonStock Part* radio button.

11. Click on the **Next** icon and the following screen will be displayed.

Line Item

Line	1	Editor	SREL
Description	Editor		
	Edit Date	Sep 23, 2010 10:06 AM	
Warehouse			
Part			
Class			
Commodity			
Green	No		

Status	Open
Line Type	Stock

View: Select

?

+

?

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12. Click on the **Warehouse Zoom** icon and select the appropriate **Warehouse**.
13. To locate the **Part** (material) being ordered, click on the **Zoom** icon and perform a **Search** as described in the *Search Query* section. After selecting the **Part**, the following screen will be displayed.

Note: The *Description* and *Commodity* fields populates when you select the *Part*.

Line Item

Line	1	Editor	SREL
Description	PAINT THINNER PAINT		
	Edit Date	Sep 23, 2010 10:06 AM	
Warehouse	MAIN	MAIN WAREHOUSE	
Part	3773		
Class			
Commodity	Paints Remover		
Green	No		

Status	Open
Line Type	Stock

View: Select

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14. Enter a **Quantity** (how many) of the **Part** (material) being requested.
15. Click on the **Done** icon and the following screen will be displayed

17

16

Transaction		14414	Editor	SREL																																																																																																						
Description		PAINT TO REMOVE GRAFFITI ON WALLS																																																																																																								
		Edit Date	Sep 23, 2010 09:59 AM																																																																																																							
		Status	ENTERED																																																																																																							
		Total	\$0.00																																																																																																							
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16. Additional materials can be requested by clicking on the **Add Line Item** icon once for each *Part* being requested, and repeating steps 11-15.
17. Click on the **Save** icon and the request will be sent for supervisor approval. The following screen will be displayed.

18

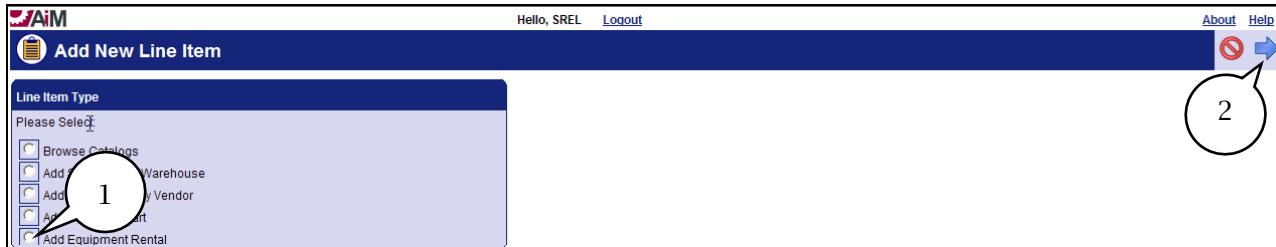
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				Status: Open																																																																																																						

18. Click on the **Print** icon to print a copy of the *Material Request*.

The Material Request process is now complete!

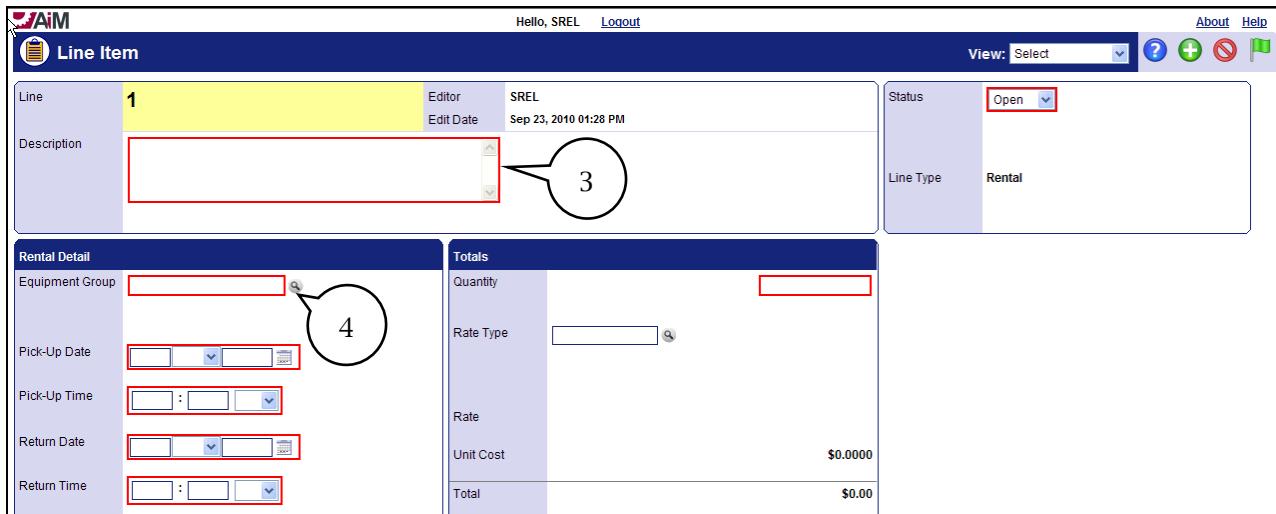
Equipment Requests

Equipment Requests are initiated in the same fashion as *Material Requests* by completing the following steps which begins after *Add Line Item* for a *Material Request*.



Line Item Type
Please Select
 Browse Catalogs
 Add to Warehouse
 Add to Vendor
 Add Equipment Rental
 Add Equipment Rental

1. Click on **Add Equipment Rental** radio button.
2. Click on the **Next** icon and the following screen will be displayed.

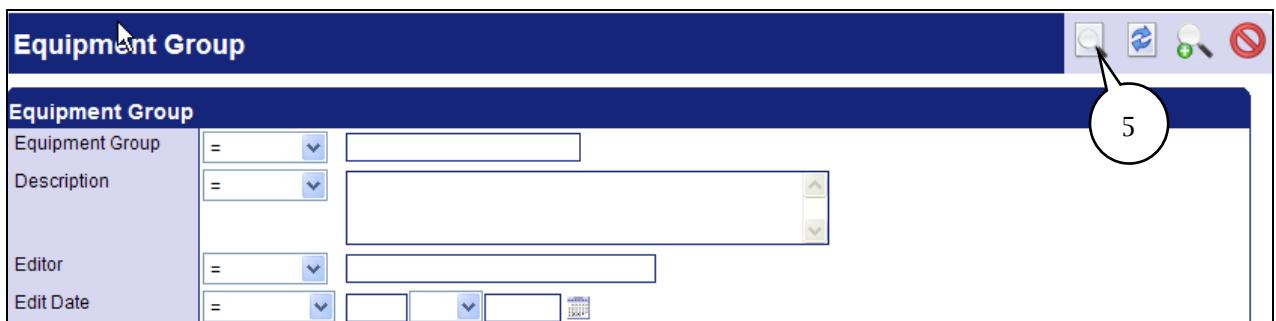


Line 1 Editor SREL
Description
Status Open
Line Type Rental

Rental Detail
Equipment Group
Pick-Up Date
Pick-Up Time
Return Date
Return Time

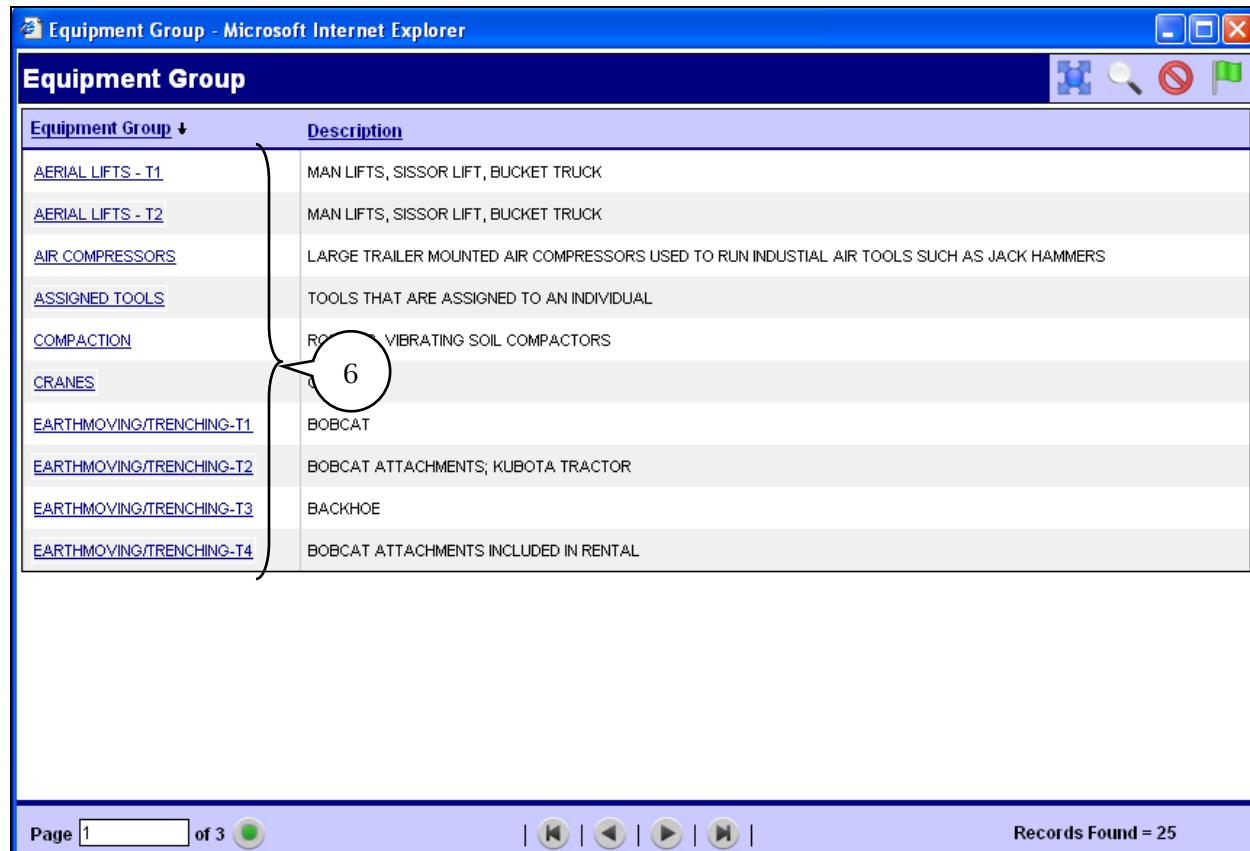
Totals
Quantity
Rate Type
Rate
Unit Cost
Total

3. Type in a description of the equipment being requested, and the purpose/reason for the request in the **Description** field.
4. Click on the **Equipment Group Zoom** icon and the following screen will be displayed.



Equipment Group
Equipment Group
Description
Editor
Edit Date

5. Click on the **Execute Search** icon and the following screen will be displayed.



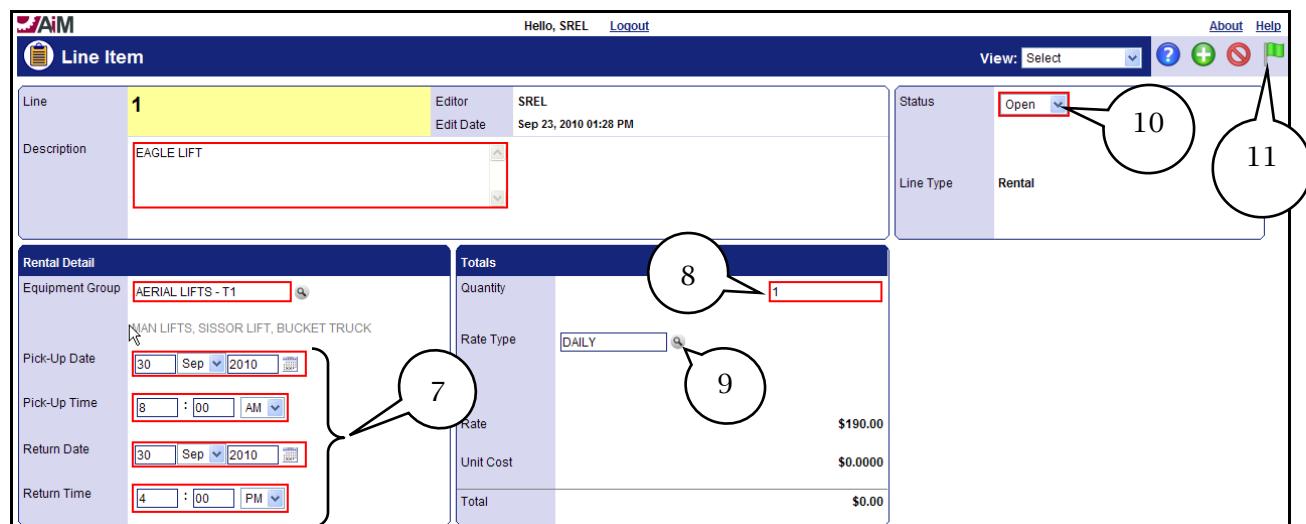
Equipment Group - Microsoft Internet Explorer

Equipment Group

Equipment Group	Description
AERIAL LIFTS - T1	MAN LIFTS, SISSOR LIFT, BUCKET TRUCK
AERIAL LIFTS - T2	MAN LIFTS, SISSOR LIFT, BUCKET TRUCK
AIR COMPRESSORS	LARGE TRAILER MOUNTED AIR COMPRESSORS USED TO RUN INDUSTRIAL AIR TOOLS SUCH AS JACK HAMMERS
ASSIGNED TOOLS	TOOLS THAT ARE ASSIGNED TO AN INDIVIDUAL
COMPACTION	ROV VIBRATING SOIL COMPACTION
CRANES	BOBCAT
EARTHMOVING/TRENCHING-T1	BOBCAT ATTACHMENTS; KUBOTA TRACTOR
EARTHMOVING/TRENCHING-T2	BACKHOE
EARTHMOVING/TRENCHING-T3	BOBCAT ATTACHMENTS INCLUDED IN RENTAL
EARTHMOVING/TRENCHING-T4	

Page 1 of 3  |  |  |  |  | Records Found = 25

6. Select the appropriate **Equipment Group** item and the following screen will be displayed.



Line Item

Line 1 Editor SREL [Logout](#)

Description EAGLE LIFT

Rental Detail

Equipment Group: AERIAL LIFTS - T1

Pick-Up Date: 30 Sep 2010

Pick-Up Time: 8 : 00 AM

Return Date: 30 Sep 2010

Return Time: 4 : 00 PM

Totals

Quantity: 1

Rate Type: DAILY

Rate: \$190.00

Unit Cost: \$0.0000

Total: \$0.00

Status: Open

Line Type: Rental

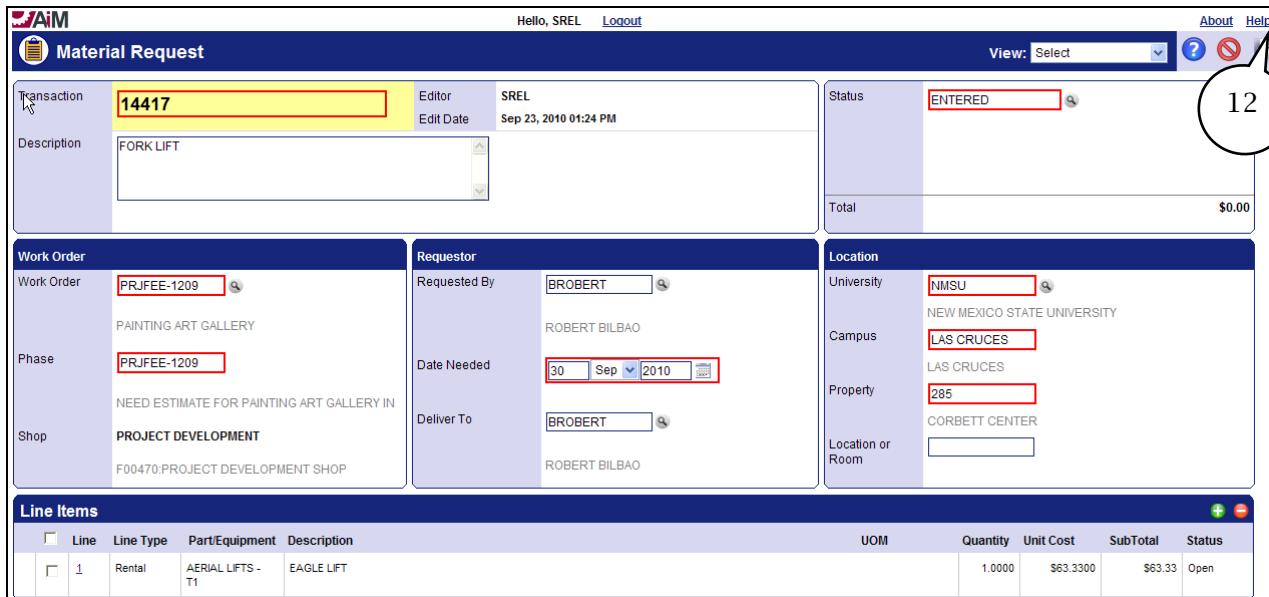
View: Select

About Help

7. Complete the **Rental Detail** block by clicking on the calendars to select **Pick- Up** and **Return Dates**, and by entering times for **Pick Up** and **Return** and selecting **AM** or **PM** (click on arrows).

8. Enter the **Quantity** (how many) being requested.

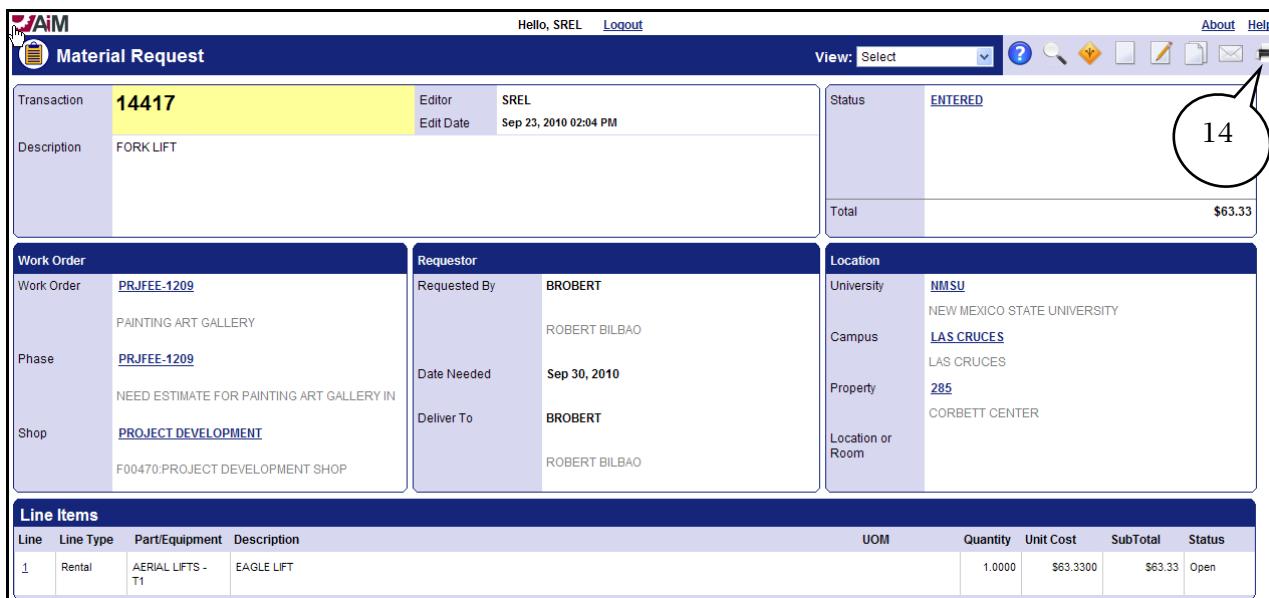
9. Click on the **Rate Type Zoom** icon and make appropriate selection.
10. **Status** should default to *Open*. If not, click on the arrow and select **Open**.
11. Click on the **Done** icon and the following screen will be displayed.



Material Request

Transaction	14417	Editor	SREL																														
Description	FORK LIFT	Edit Date	Sep 23, 2010 01:24 PM																														
		Status	ENTERED																														
		Total	\$0.00																														
<table border="1"> <tr> <td>Work Order</td> <td>Requestor</td> <td>Location</td> </tr> <tr> <td>Work Order PRJFEE-1209 PAINTING ART GALLERY</td> <td>Requested By BROBERT ROBERT BILBAO</td> <td>University NMSU NEW MEXICO STATE UNIVERSITY</td> </tr> <tr> <td>Phase PRJFEE-1209 NEED ESTIMATE FOR PAINTING ART GALLERY IN</td> <td>Date Needed 30 Sep 2010</td> <td>Campus LAS CRUCES LAS CRUCES</td> </tr> <tr> <td>Shop PROJECT DEVELOPMENT F00470:PROJECT DEVELOPMENT SHOP</td> <td>Deliver To BROBERT ROBERT BILBAO</td> <td>Property 285 CORBETT CENTER</td> </tr> </table>				Work Order	Requestor	Location	Work Order PRJFEE-1209 PAINTING ART GALLERY	Requested By BROBERT ROBERT BILBAO	University NMSU NEW MEXICO STATE UNIVERSITY	Phase PRJFEE-1209 NEED ESTIMATE FOR PAINTING ART GALLERY IN	Date Needed 30 Sep 2010	Campus LAS CRUCES LAS CRUCES	Shop PROJECT DEVELOPMENT F00470:PROJECT DEVELOPMENT SHOP	Deliver To BROBERT ROBERT BILBAO	Property 285 CORBETT CENTER																		
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Line Items																																	
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1	Rental	AERIAL LIFTS - T1	EAGLE LIFT	1.0000																													
				\$63.3300																													
				\$63.33																													
				Open																													

12. Click on the **Save** icon and the following screen will be displayed.



Material Request

Transaction	14417	Editor	SREL																														
Description	FORK LIFT	Edit Date	Sep 23, 2010 02:04 PM																														
		Status	ENTERED																														
		Total	\$63.33																														
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Line Items																																	
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1	Rental	AERIAL LIFTS - T1	EAGLE LIFT	1.0000																													
				\$63.3300																													
				\$63.33																													
				Open																													

13. Click on the **Print** icon to print a copy of the *Equipment Request*.

The Equipment Request process is now complete!

Material/Equipment Request Approval

Material and *Equipment Requests* must be approved by the supervisor by completing the following steps. This example is for material from a *Shop Warehouse*.

After logging on the AiM **WorkDesk** will be displayed.



1. Click on **Work Management** and the following screen will be displayed.



2. Click on **Material Request** and the following screen will be displayed.

Material Request

Transaction	Editor		Status		
Description	Edit Date				
Work Order		Requestor		Location	
Work Order			Requested By	University	
Phase			Date Needed	Campus	
Shop			Deliver To	Property	
				Location or Room	
Line Items					
Line	Line Type	Part/Equipment	Description	UOM	Quantity
Unit Cost	SubTotal	Status			

3. Click on the **Search** icon and the following screen will be displayed.

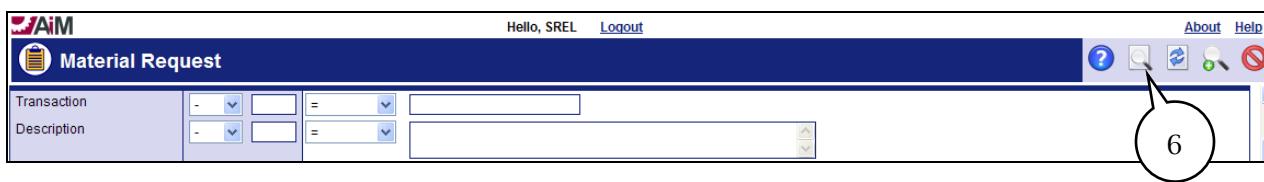
Material Request

Transaction	-	-	=	-	-												
Description	-	-	=	-	-												
Work Order	-	-	=	-	-												
Phase	-	-	=	-	-												
Date Needed	-	-	=	-	-												
Requested By	-	-	=	-	-												
Status	-	-	=	-	-												
University	-	-	=	-	-												
Campus	-	-	=	-	-												
Property	-	-	=	-	-												
Location or Room	-	-	=	-	-												
Deliver To	-	-	=	-	-												
Extra Description	-	-	=	-	-												
Edit Date	-	-	=	-	-												
Editor	-	-	=	-	-												
Line Items																	
<table border="1"> <tr> <td>Phase</td> <td colspan="4">Show</td> <td>Hide</td> </tr> <tr> <td>Shop</td> <td>-</td> <td>-</td> <td>=</td> <td>-</td> <td>-</td> </tr> </table>						Phase	Show				Hide	Shop	-	-	=	-	-
Phase	Show				Hide												
Shop	-	-	=	-	-												

4. Click on the **Shop Zoom** icon and the following screen will be displayed.

Shop		Description
CARPENTRY		F00456:CARPENTRY SHOP
CONSTRUCTION		F00472:CONSTRUCTION SHOP
CUP		F00457:CENTRAL UTILITY PLANT
CUSTODIAL		F00458:CUSTODIAL SHOP
ELECTRIC		F00459:ELCTRIC SHOP
ENERGY MGMT		500650:ENERGY MANAGEMENT SYSTEMS
ENGINEERING		F00462:ENGINEERING SHOP
GROUNDS		F00463:GROUNDS SHOP
HEAVY EQUIPMENT		500617:HEAVY EQUIPMENT
HEAVY EQUIPMENT FUEL		500617: HEAVY EQUIPMENT

5. Click on the appropriate **Shop** and the following screen will be displayed. Use the *Page Navigation (DVD)* buttons at the bottom of the screen to look for additional **Shops**.

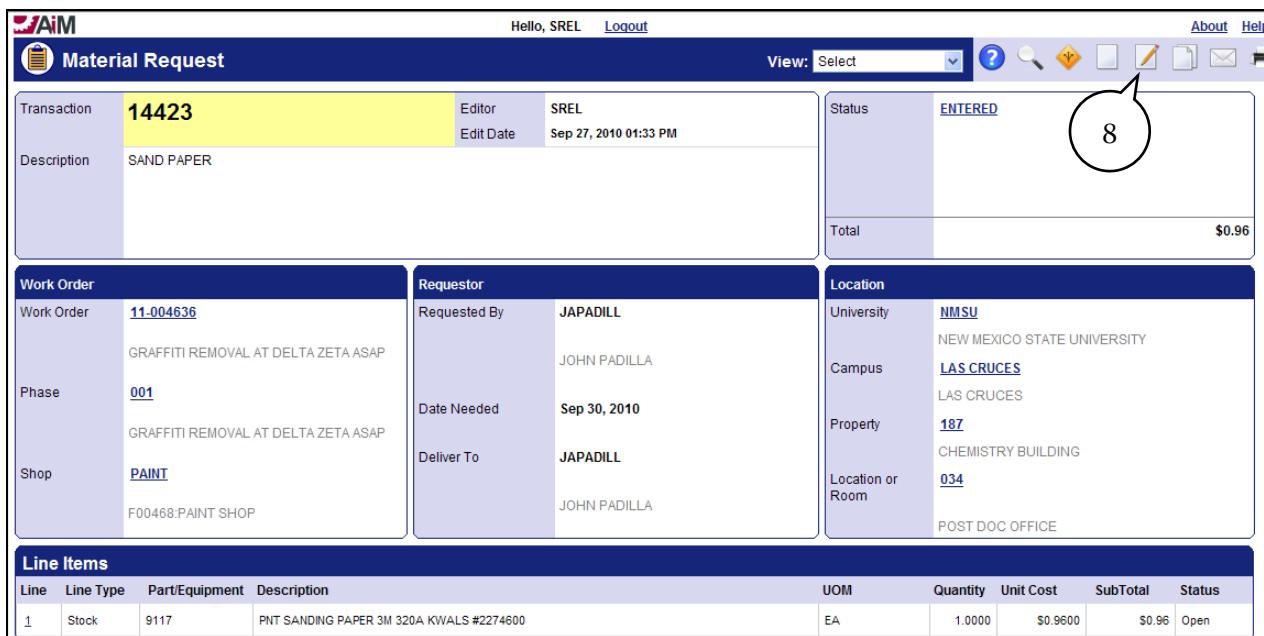


The screenshot shows the 'Material Request' screen. At the top, there are two search fields for 'Transaction' and 'Description', each with dropdown menus and a search icon. Above these fields are buttons for 'Hello, SREL' and 'Logout'. To the right of the search fields are buttons for 'About' and 'Help'. A large circular callout with the number '6' points to the search icon in the 'Description' field.

6. Click on the **Execute Search** icon and the following screen will be displayed.

Transaction	Work Order	Phase	Date Needed	Placed By	Status	University	Campus	Property	Location or Room	Location ID	Shop Person
10007	10-006005	003	Jun 09, 2010	CASJOSEP	CLOSED	NMSU	LAS CRUCES	366			CASJOSEP
10009	10-011513	PAINT	Jun 09, 2010	CASJOSEP	CLOSED	NMSU	LAS CRUCES	221			CASJOSEP
10025	10-006005	003	Jun 09, 2010	CASJOSEP	CLOSED	NMSU	LAS CRUCES	366			CASJOSEP
10031	10-009438	002	Jun 09, 2010	RMADERO	CLOSED	NMSU	LAS CRUCES	536			RMADERO
10035	10-011780	001	Jun 09, 2010	JANNET	CLOSED	NMSU	LAS CRUCES	184			JANNET
10054	10-011780	PAINT	Jun 10, 2010	CASJOSEP	CLOSED	NMSU	LAS CRUCES	221			CASJOSEP
10059	10-011780	001	Jun 10, 2010	FREDROD	CLOSED	NMSU	LAS CRUCES	184			FREDROD
10079	10-011608	001	Jun 10, 2010	JAPADILL	CLOSED	NMSU	LAS CRUCES	187	W156	W156^1	JAPADILL
10134	10-012013	001	Jun 10, 2010	CZAP	CLOSED	NMSU	LAS CRUCES	288	201	201^1	CZAP
10152	10-011608	001	Jun 10, 2010	JAPADILL	CLOSED	NMSU	LAS CRUCES	187	W156	W156^1	JAPADILL
10165	10-011513	PAINT	Jun 11, 2010	RPUENT	CLOSED	NMSU	LAS CRUCES	221			RPUENT
10179	10-012013	001	Jun 11, 2010	CZAP	CLOSED	NMSU	LAS CRUCES	288	201	201^1	CZAP

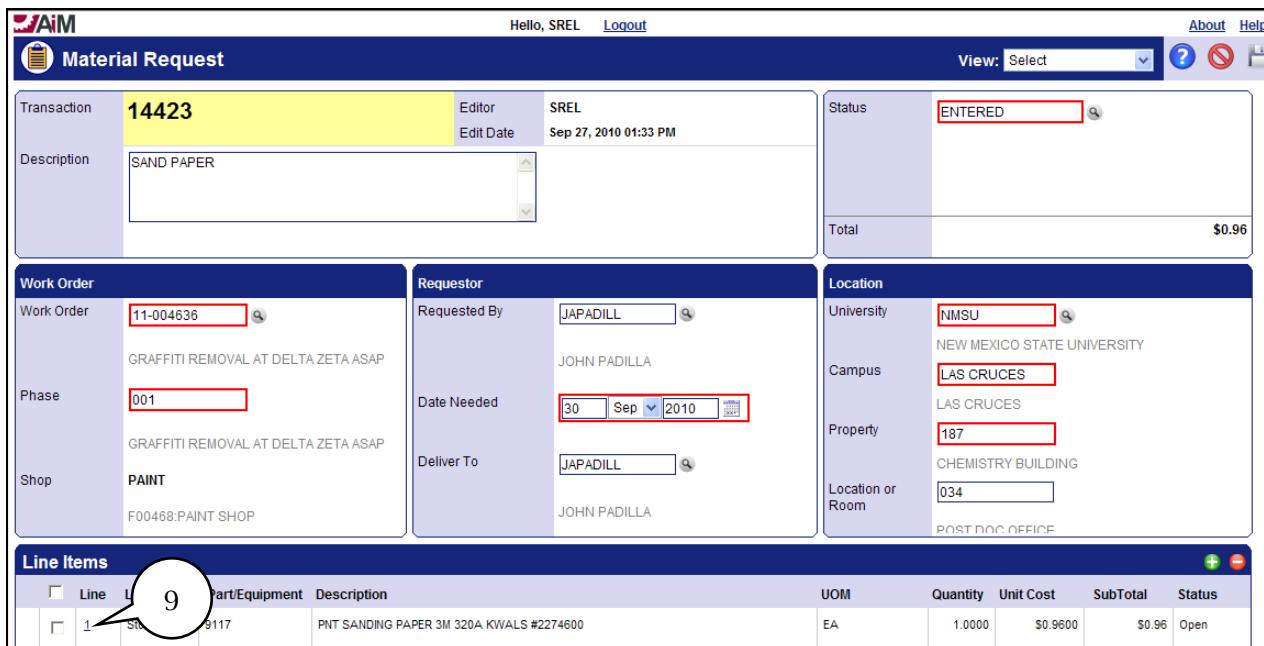
7. Click on the appropriate **Transaction** number and the following screen will be displayed.



Material Request

Transaction	14423	Editor	SREL																		
Description	SAND PAPER	Edit Date	Sep 27, 2010 01:33 PM																		
		Status	ENTERED																		
		Total	\$0.96																		
Work Order Work Order: 11-004636 GRAFFITI REMOVAL AT DELTA ZETA ASAP		Requestor Requested By: JAPADILL JOHN PADILLA Date Needed: Sep 30, 2010 Deliver To: JAPADILL JOHN PADILLA	Location University: NMSU NEW MEXICO STATE UNIVERSITY Campus: LAS CRUCES LAS CRUCES Property: 187 CHEMISTRY BUILDING Location or Room: 034 POST DOC OFFICE																		
Line Items <table border="1"> <thead> <tr> <th>Line</th> <th>Line Type</th> <th>Part/Equipment</th> <th>Description</th> <th>UOM</th> <th>Quantity</th> <th>Unit Cost</th> <th>SubTotal</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Stock</td> <td>9117</td> <td>PNT SANDING PAPER 3M 320A KWALS #2274600</td> <td>EA</td> <td>1.0000</td> <td>\$0.9600</td> <td>\$0.96</td> <td>Open</td> </tr> </tbody> </table>				Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status	1	Stock	9117	PNT SANDING PAPER 3M 320A KWALS #2274600	EA	1.0000	\$0.9600	\$0.96	Open
Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status													
1	Stock	9117	PNT SANDING PAPER 3M 320A KWALS #2274600	EA	1.0000	\$0.9600	\$0.96	Open													

8. Click on the **Edit** icon and the following screen will be displayed.



Material Request

Transaction	14423	Editor	SREL																		
Description	SAND PAPER	Edit Date	Sep 27, 2010 01:33 PM																		
		Status	ENTERED																		
		Total	\$0.96																		
Work Order Work Order: 11-004636 GRAFFITI REMOVAL AT DELTA ZETA ASAP		Requestor Requested By: JAPADILL JOHN PADILLA Date Needed: 30 Sep 2010 Deliver To: JAPADILL JOHN PADILLA	Location University: NMSU NEW MEXICO STATE UNIVERSITY Campus: LAS CRUCES LAS CRUCES Property: 187 CHEMISTRY BUILDING Location or Room: 034 POST DOC OFFICE																		
Line Items <table border="1"> <thead> <tr> <th>Line</th> <th>Line Type</th> <th>Part/Equipment</th> <th>Description</th> <th>UOM</th> <th>Quantity</th> <th>Unit Cost</th> <th>SubTotal</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Stock</td> <td>9117</td> <td>PNT SANDING PAPER 3M 320A KWALS #2274600</td> <td>EA</td> <td>1.0000</td> <td>\$0.9600</td> <td>\$0.96</td> <td>Open</td> </tr> </tbody> </table>				Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status	1	Stock	9117	PNT SANDING PAPER 3M 320A KWALS #2274600	EA	1.0000	\$0.9600	\$0.96	Open
Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status													
1	Stock	9117	PNT SANDING PAPER 3M 320A KWALS #2274600	EA	1.0000	\$0.9600	\$0.96	Open													

9. Click on the **Line Item** number to review the *Material Request*, including which warehouse the material was ordered from, and the following screen will be displayed.

Line Item

Line	1	Editor	SREL
Description	PNT SANDING PAPER 3M 320A KWALS #2274600	Edit Date	Sep 27, 2010 01:33 PM
		Status	Open
		Line Type	Stock

Part	Totals
Warehouse	Quantity: 1.0000
Part	Unit Cost: \$0.9600
Class	Total: \$0.96
Commodity	
Green	No

10. In this example, the material will come from the **Main Warehouse** as reflected in the **Warehouse** field.
 11. Click on the **Done** icon to return to the **Material Request** screen.

Material Request

Transaction	14423	Editor	SREL
Description	SAND PAPER	Edit Date	Sep 27, 2010 01:33 PM
		Status	ENTERED
		Total	\$0.96

Work Order	Requestor	Location
Work Order	Requested By: JAPADILL	University: NMSU
Phase	JOHN PADILLA	NEW MEXICO STATE UNIVERSITY
Shop	Date Needed: 30 Sep 2010	Campus: LAS CRUCES
	Deliver To: JAPADILL	LAS CRUCES
	JOHN PADILLA	Property: 187
		CHEMISTRY BUILDING
		Location or Room: 034
		POST DOC OFFICE

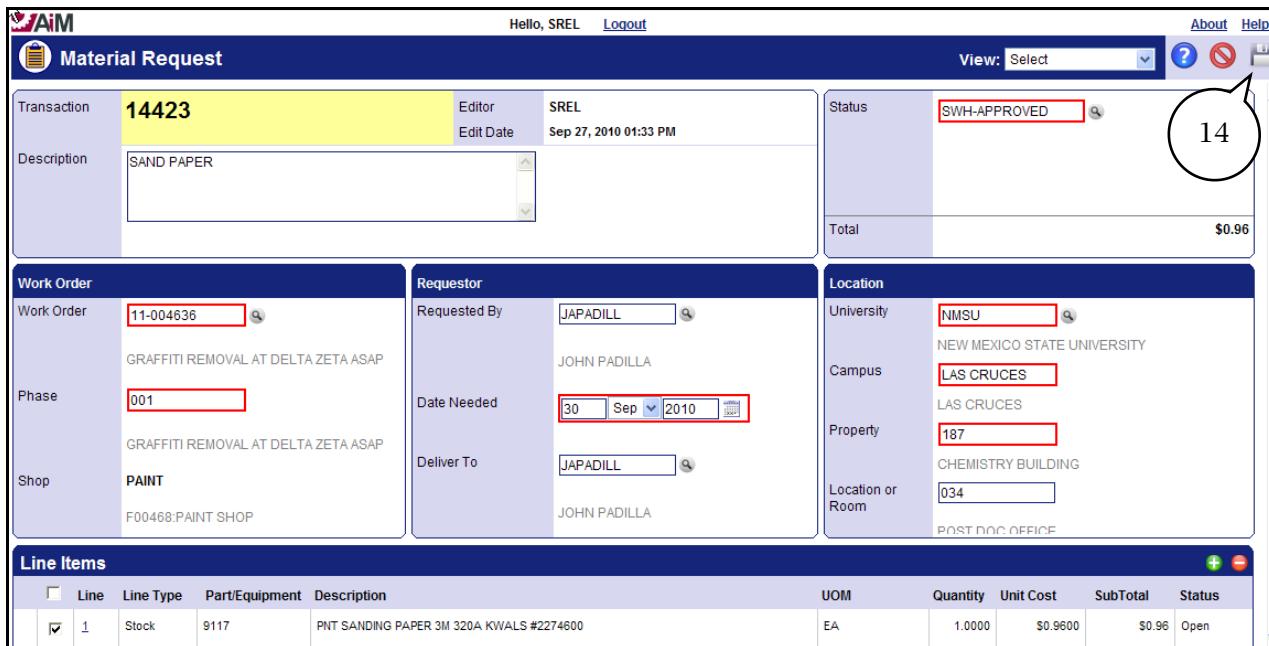
Line Items										
	Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status	
	<input checked="" type="checkbox"/>	1	Stock	9117	PNT SANDING PAPER 3M 320A KWALS #2274600	EA	1.0000	\$0.9600	\$0.96	Open

12. Click on the **Status Zoom** icon and the following screen will be displayed.

Material Request Status	
Status	Description
ENTERED	MATERIAL REQUEST HAS BEEN ENTERED
MAT-APPROVED	MATERIAL APPROVAL BY SUPERVISOR
RNT-APPROVED	RENTAL APPROVAL BY SUPERVISOR
SWH-APPROVED 13	APPROVED FOR THE SHOP WAREHOUSE
CANCEL	MATERIAL REQUEST HAS BEEN CANCELLED

13. Since this example is for a *Material Request* from a *Shop Warehouse*, to change the status click on *SWH-Approved* under the **Status** column and the following screen will be displayed.

Note: If the material was requested from the *Main Warehouse*, *Mat-Approved* would be selected from the *Status* column. For equipment requests, select *RNT-Approved* from the *Status* column.



The screenshot shows the AiM 4.1 Material Request screen. The status field is highlighted with a red box and labeled '13'. The save icon in the bottom right corner is highlighted with a red box and labeled '14'.

Transaction		Editor	SREL						
14423		SREL	Sep 27, 2010 01:33 PM						
Description	SAND PAPER								
		Status	SWH-APPROVED						
		Total	\$0.96						
Work Order		Requestor							
Work Order	11-004636	Requested By	JAPADILL						
Phase	001		JOHN PADILLA						
Shop	GRAFFITI REMOVAL AT DELTA ZETA ASAP	Date Needed	30 Sep 2010						
	GRAFFITI REMOVAL AT DELTA ZETA ASAP	Deliver To	JAPADILL						
	PAINT		JOHN PADILLA						
	F00468:PAINT SHOP								
Location									
University	NMSU								
Campus	NEW MEXICO STATE UNIVERSITY								
Property	LAS CRUCES								
Location or Room	187								
	CHEMISTRY BUILDING								
	034								
	POST DOC OFFICE								
Line Items									
Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status	
<input checked="" type="checkbox"/>	1	Stock	9117	PNT SANDING PAPER 3M 320A KWALS #2274600	EA	1.0000	\$0.9600	\$0.96	Open

14. Click on the **Save** icon and the following screen will be displayed.

Material Request

Transaction	14423	Editor	SREL																		
Description	SAND PAPER	Edit Date	Sep 27, 2010 02:48 PM																		
		Status	SWH-APPROVED																		
		Total	\$0.96																		
Work Order Work Order: 11-004636 GRAFFITI REMOVAL AT DELTA ZETA ASAP		Requestor Requested By: JAPADILL JOHN PADILLA Date Needed: Sep 30, 2010 Deliver To: JAPADILL JOHN PADILLA	Location University: NMSU NEW MEXICO STATE UNIVERSITY Campus: LAS CRUCES LAS CRUCES Property: 187 CHEMISTRY BUILDING Location or Room: 034 POST DOC OFFICE																		
Line Items <table border="1"> <thead> <tr> <th>Line</th> <th>Line Type</th> <th>Part/Equipment</th> <th>Description</th> <th>UOM</th> <th>Quantity</th> <th>Unit Cost</th> <th>SubTotal</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Stock</td> <td>9117</td> <td>PNT SANDING PAPER 3M 320A KWALS #2274600</td> <td>EA</td> <td>1.0000</td> <td>\$0.9600</td> <td>\$0.96</td> <td>Open</td> </tr> </tbody> </table>				Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status	1	Stock	9117	PNT SANDING PAPER 3M 320A KWALS #2274600	EA	1.0000	\$0.9600	\$0.96	Open
Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status													
1	Stock	9117	PNT SANDING PAPER 3M 320A KWALS #2274600	EA	1.0000	\$0.9600	\$0.96	Open													

15. Click on the **Print** icon to print a copy of the approved *Material Request*.

The Material/Equipment Request Approval process is now complete!

Pick Ticket

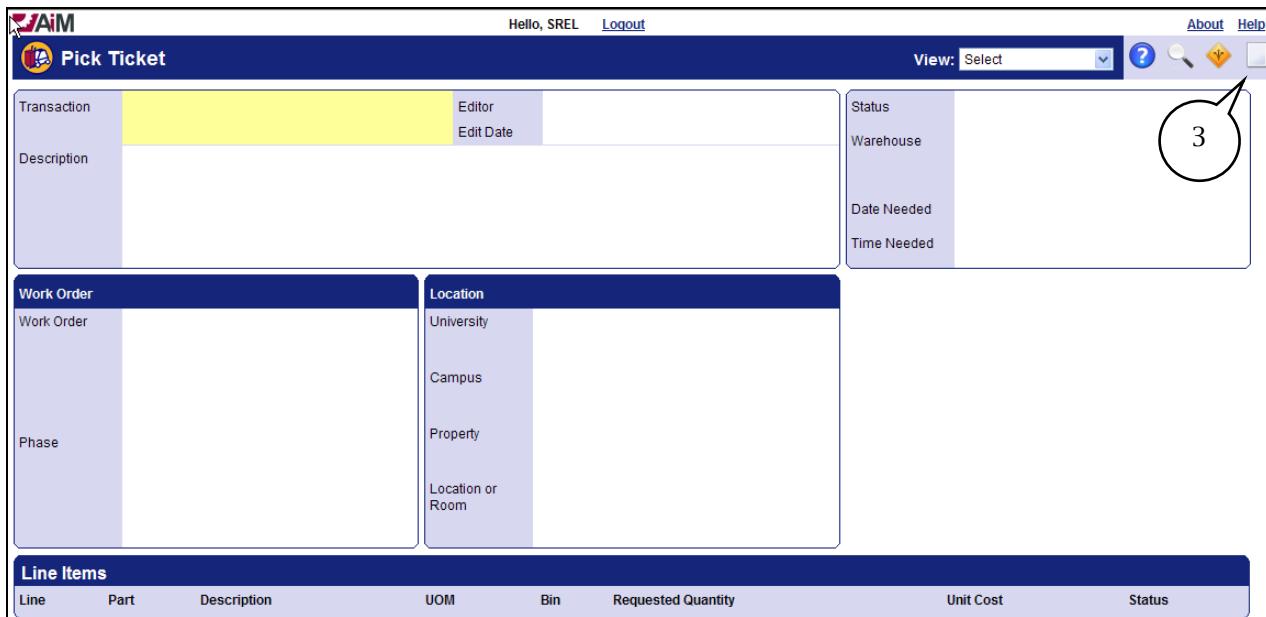
Whether for the **Main Warehouse** or **Shop Warehouse**, after material/equipment requests have been approved in the AiM system the following steps must be completed for inventory tracking purposes. This example will be for a **Shop Warehouse**.



1. Select the **Inventory** module and the following will be displayed.

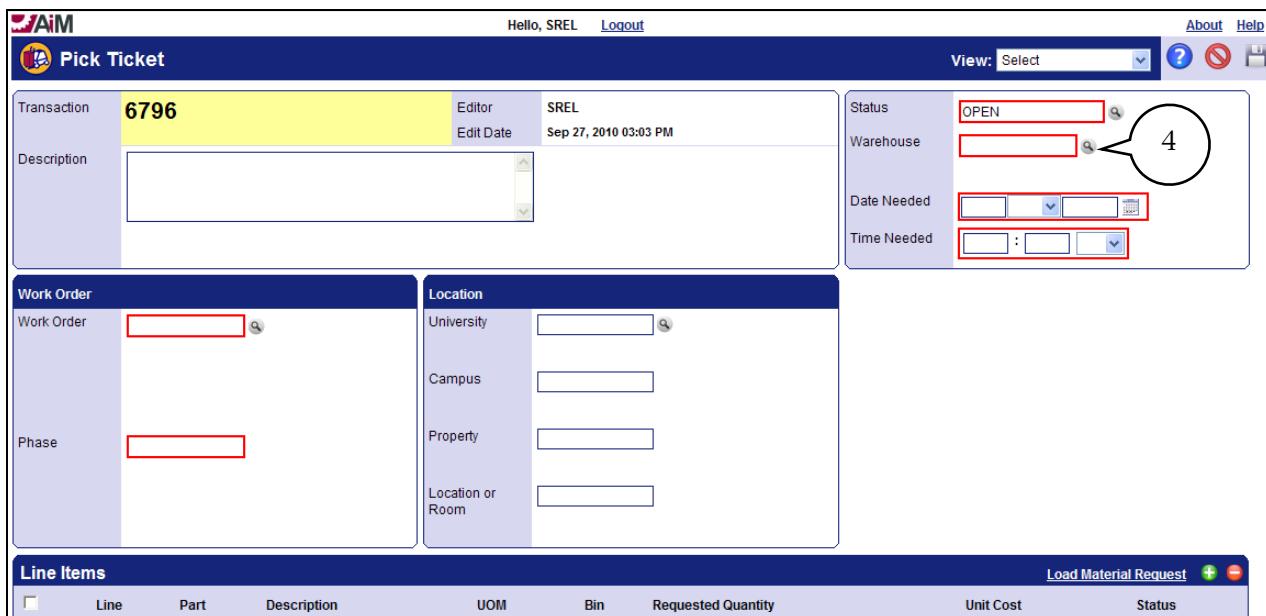


2. Click on **Pick Ticket** and the following screen will be displayed.



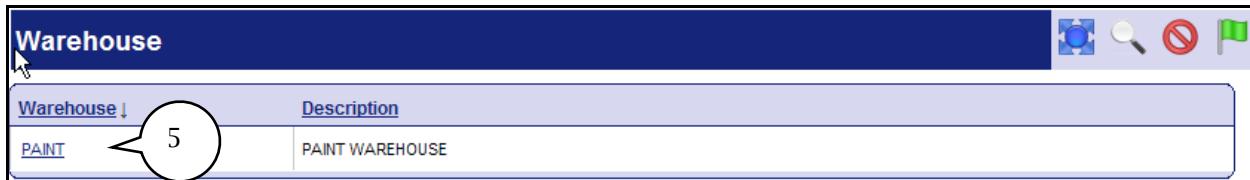
This screenshot shows the 'Pick Ticket' screen in AiM. The top navigation bar includes 'Hello, SREL' and 'Logout' on the left, and 'About' and 'Help' on the right. A 'View' dropdown is set to 'Select'. The main area is titled 'Pick Ticket' with a sub-section 'Transaction'. The 'Status' field is set to 'Warehouse'. A callout '3' points to the 'New' icon in the top right corner of the transaction area. Below this are sections for 'Work Order' and 'Location', and a table for 'Line Items'.

3. Click on the **New** icon and the following screen will be displayed.



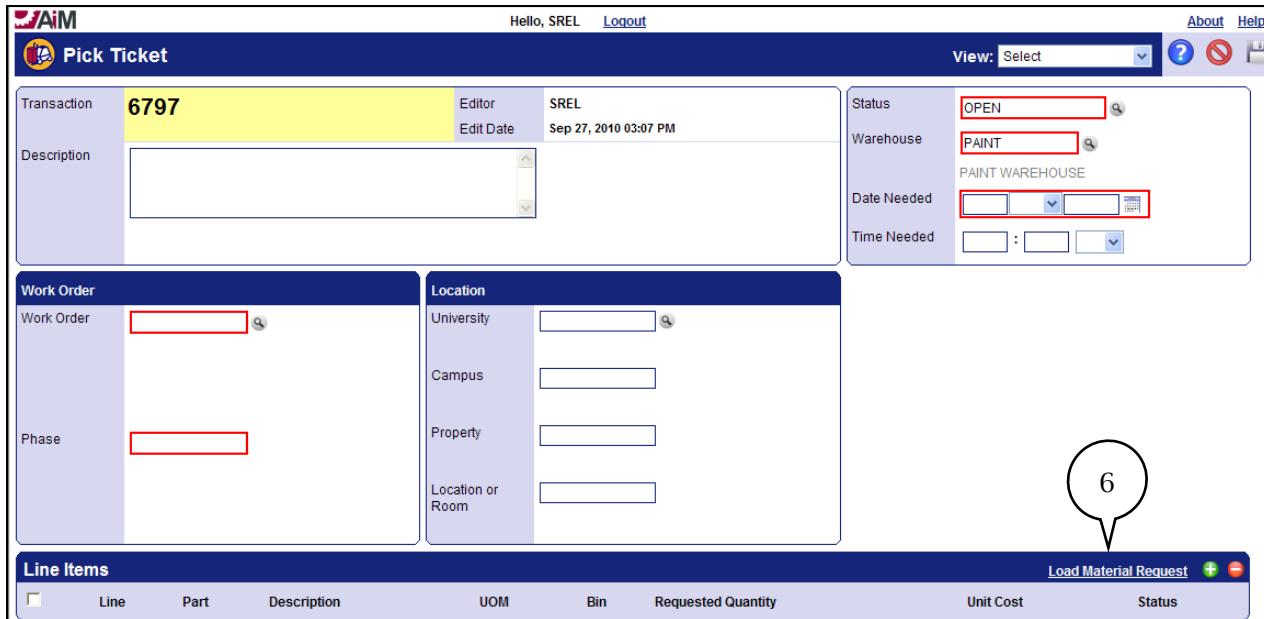
This screenshot shows the 'Pick Ticket' screen with a transaction ID of '6796' and a date of 'Sep 27, 2010 03:03 PM'. The 'Status' field is set to 'OPEN'. A callout '4' points to the 'Warehouse' icon in the top right corner of the transaction area. Below this are sections for 'Work Order' and 'Location', and a table for 'Line Items'. The 'Warehouse' icon is highlighted with a red box.

4. Click on the **Warehouse** icon and the following screen will be displayed.



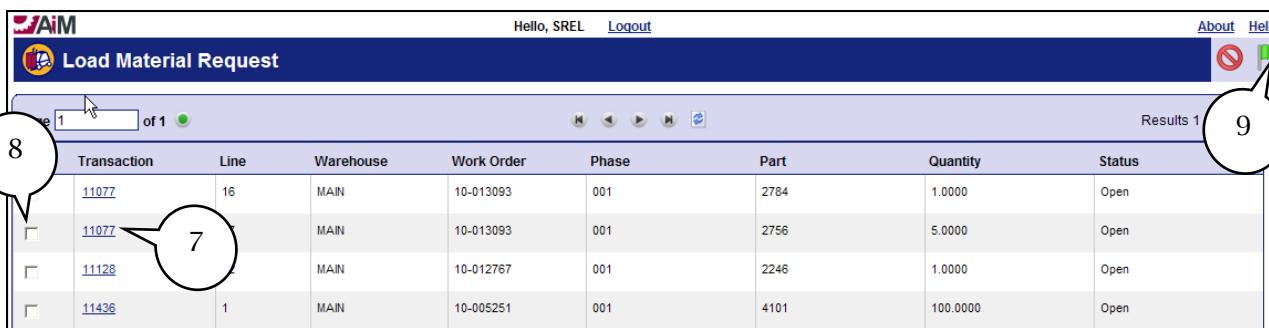
The screenshot shows a search interface for a warehouse. The search bar contains the text 'PAINT' and the results table shows a single entry: 'PAINT WAREHOUSE'. A callout bubble labeled '5' points to the search bar.

5. Select the appropriate **Warehouse**, in this example *Paint*, and the *Pick Ticket* screen will reappear.



The screenshot shows the 'Pick Ticket' screen. The transaction number is 6797. The 'Warehouse' field is set to 'PAINT' (highlighted with a red box). A callout bubble labeled '6' points to the 'Warehouse' field. The 'Status' is 'OPEN'.

6. Click on the **Load Material Request** icon and the following screen will be displayed.



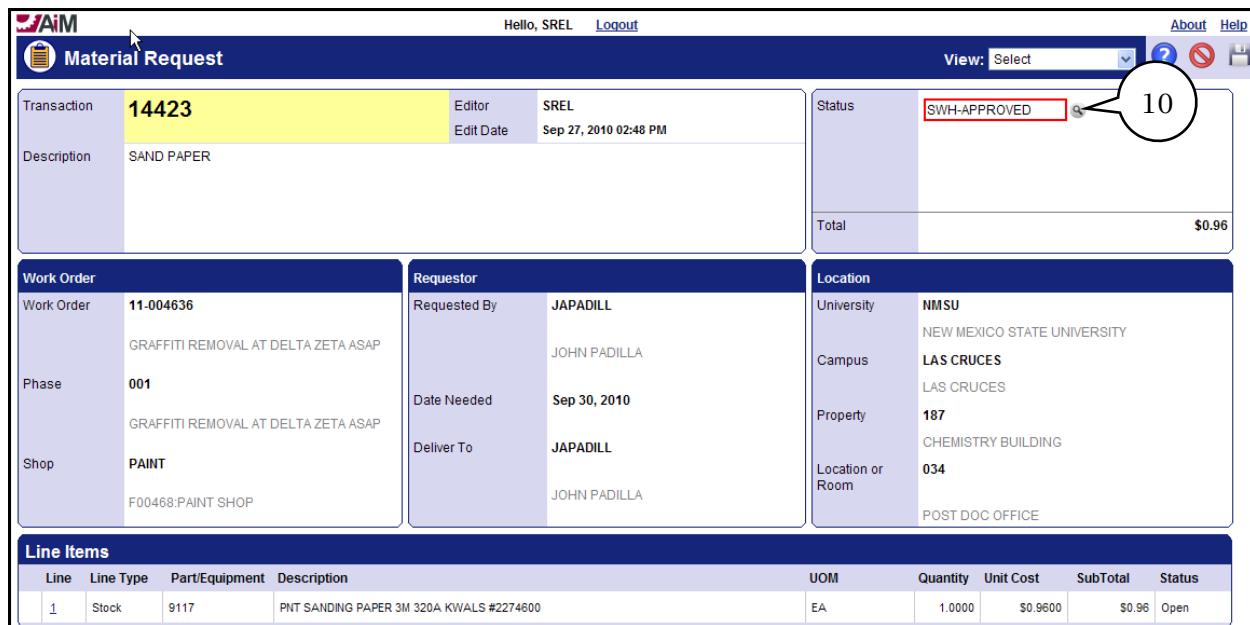
The screenshot shows the 'Load Material Request' screen. A callout bubble labeled '8' points to the 'Transaction' column of the table. A callout bubble labeled '7' points to the transaction number '11077' in the second row. A callout bubble labeled '9' points to the 'Done' icon in the top right corner. The table lists material requests with columns for Transaction, Line, Warehouse, Work Order, Phase, Part, Quantity, and Status.

Transaction	Line	Warehouse	Work Order	Phase	Part	Quantity	Status
11077	16	MAIN	10-013093	001	2784	1.0000	Open
11077		MAIN	10-013093	001	2756	5.0000	Open
11128		MAIN	10-012767	001	2246	1.0000	Open
11436	1	MAIN	10-005251	001	4101	100.0000	Open

7. Click on the **Transaction** number(s) to review the *Material Request*, then click on the **Done** icon to return to the *Pick Ticket* screen.
8. To select items for the *Pick Ticket*, click on the box(s) next to the desired **Transaction** number(s) and a check mark will appear in the box(s).
9. Click on the **Done** icon and the following screen will be displayed.

Note: When the **Done** icon was clicked, all required fields on the *Pick Ticket* screen automatically populate.

10.

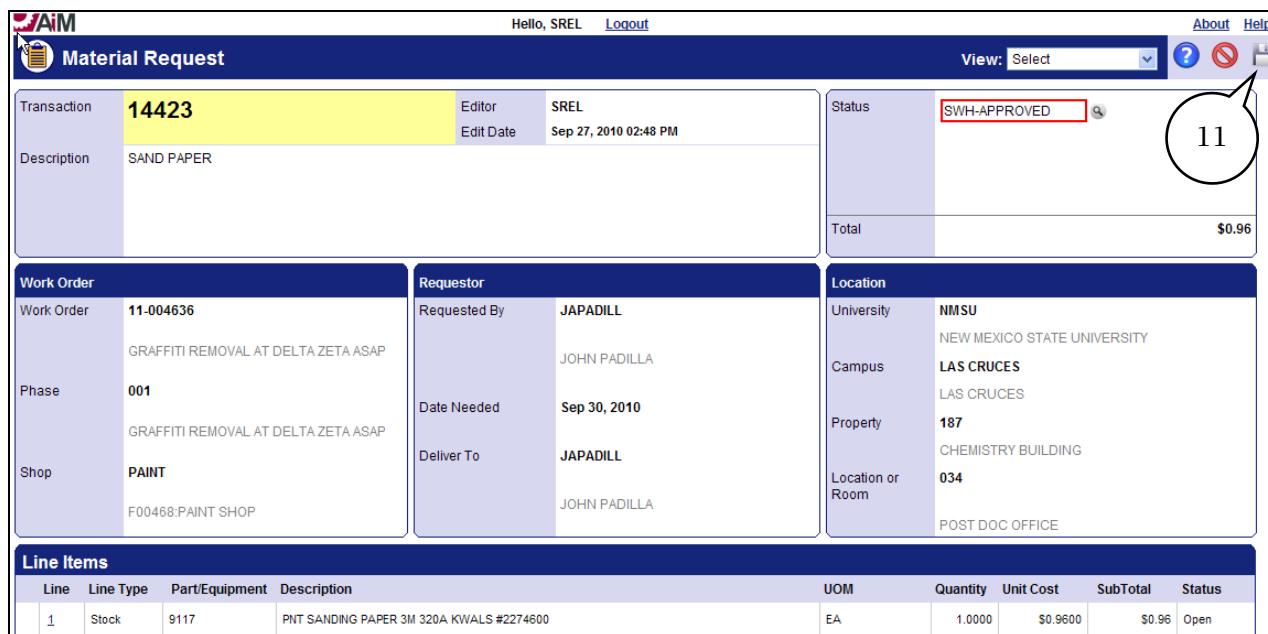


This screenshot shows the Material Request screen in AiM. The transaction number is 14423. The status is listed as "SWH-APPROVED". A callout bubble with the number 10 points to the status icon.

Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status
1	Stock	9117	PNT SANDING PAPER 3M 320A KWALS #2274600	EA	1.0000	\$0.9600	\$0.96	Open

10. Click on the **Status** icon and the following screen will be displayed.

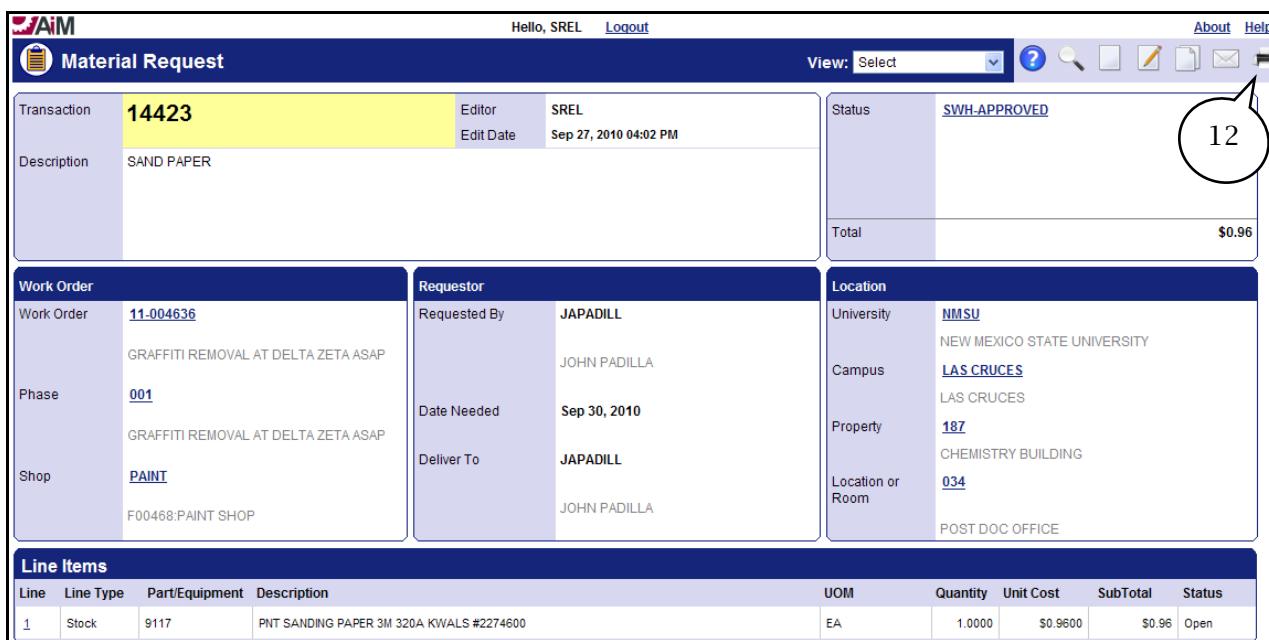
11.



This screenshot shows the Material Request screen in AiM. The transaction number is 14423. The status is listed as "SWH-APPROVED". A callout bubble with the number 11 points to the status icon.

Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status
1	Stock	9117	PNT SANDING PAPER 3M 320A KWALS #2274600	EA	1.0000	\$0.9600	\$0.96	Open

11. Click on the **Save** icon and the following screen will be displayed.



Material Request

Transaction	14423	Editor	SREL					
Description	SAND PAPER	Edit Date	Sep 27, 2010 04:02 PM					
		Status	SWH-APPROVED					
		Total	\$0.96					
Work Order		Requestor						
Work Order	11-004636 GRAFFITI REMOVAL AT DELTA ZETA ASAP	Requested By	JAPADILL JOHN PADILLA					
Phase	001 GRAFFITI REMOVAL AT DELTA ZETA ASAP	Date Needed	Sep 30, 2010					
Shop	PAINT F00468:PAINT SHOP	Deliver To	JAPADILL JOHN PADILLA					
Location								
University	NMSU NEW MEXICO STATE UNIVERSITY							
Campus	LAS CRUCES LAS CRUCES							
Property	187 CHEMISTRY BUILDING							
Location or Room	034 POST DOC OFFICE							
Line Items								
Line	Line Type	Part/Equipment	Description	UOM	Quantity	Unit Cost	SubTotal	Status
1	Stock	9117	PNT SANDING PAPER 3M 320A KWALS #2274600	EA	1.0000	\$0.9600	\$0.96	Open

12. Click on the **Print** icon to print a copy of the *Pick Ticket*.

The Pick Ticket process is now complete!

Counter Release

Whether for the **Main Warehouse** or **Shop Warehouse**, after material/equipment requests have been approved and a **Pick Ticket** has been completed, a **Counter Release** is completed when the employee picks up the material or equipment. The following steps must be completed for a **Counter Release**; in this example to release material from a **Shop Warehouse**.



1. Select the **Inventory** module and the following will be displayed.



2. Click on **Counter Release** and the following screen will be displayed.

Counter Release

Transaction	Editor	Reference Number
Description	Edit Date	Warehouse
		Total Cost
		\$0.00

Release Persons

Released By	
Released To	

Line Items

Line	Part	Description	Bin	Release Quantity	Return Quantity	Work Order	Phase	Pick Ticket
------	------	-------------	-----	------------------	-----------------	------------	-------	-------------

3. Click on the **New** icon and the following screen will be displayed.

Counter Release

Transaction	13276	Editor	SREL	Reference Number
Description		Edit Date	Sep 28, 2010 02:39 PM	Warehouse
				Total Cost
				\$0.00

Release Persons

Released By	
Released To	

Line Items

Line	Part	Description	Bin	Release Quantity	Return Quantity	Work Order	Phase	Pick Ticket
------	------	-------------	-----	------------------	-----------------	------------	-------	-------------

4. Click on the **Warehouse** icon and the following screen will be displayed.

Warehouse	
Warehouse	Description
CARPENTRY	CARPENTRY WAREHOUSE
CONSTRUCTION	CONSTRUCTION WAREHOUSE
ELECTRIC	ELECTRIC WAREHOUSE
GROUNDS	GROUNDS WAREHOUSE
HVAC	HVAC WAREHOUSE
LOCKSHOP	LOCKSHOP WAREHOUSE
MAIN	MAIN WAREHOUSE
MECHANICS	MECHANICS WAREHOUSE
PAINT	PAINT WAREHOUSE
PLUMBING	PLUMBING WAREHOUSE

5. Click on the appropriate **Warehouse** and the following screen will be displayed.

The screenshot shows the AiM Counter Release interface. At the top, it displays 'Hello, SREL' and 'Logout' with 'About' and 'Help' links. The main area is titled 'Counter Release' and shows a transaction record for '13276' edited by 'SREL' on 'Sep 28, 2010 02:39 PM'. The 'Warehouse' field is set to 'PAINT'. The 'Release Persons' section shows 'Released By' and 'Released To' fields, both of which are highlighted with red boxes. The 'Line Items' toolbar at the bottom includes a 'Load Pick Tickets' button, which is also highlighted with a red box and has a speech bubble labeled '6' pointing to it.

6. Click on the **Load Pick Ticket** icon and the following screen will be displayed.

7. Click on the **Transaction** number(s) to review the *Pick Ticket*, then click on the **Done** icon to return to the *Counter Release* screen.

8. To select desired transaction, click on the box next to the desired **Transaction** number(s) and a check mark will appear.
 9. Click on the **Done** icon and the following screen will be displayed.

Line	Part	Description	Bin	Release Quantity	Return Quantity	Work Order	Phase	Pick Ticket
1	2416	PVC PIPE 1" BELL END SIERRA IRG	OS-C:2416	3.0000	0.0000	10-012317	005	5260

10. Click on the **Released By** Zoom icon and the following screen will be displayed.

Employee

Employee ID	First Name	Last Name
11 ABELZ	ABEL	ZAPIEN
LEONARD	LEONARD	BANEGAS

11. Click on the appropriate **Employee ID** and the *Counter Release* screen will reappear.

Counter Release

Transaction	13283	Editor	SREL																		
		Edit Date	Sep 28, 2010 03:23 PM																		
Description	PROVIDE PLUMBING FOR LAB/OFFICE AREA AND RESTROOMS FOR HORSE FARM BARN																				
	Reference Number																				
	Warehouse	MAIN																			
	Total Cost	\$24.75																			
Release Persons Released By: ABELZ Released To: ABEL ZAPIEN 12																					
Default Work Order: <input type="text"/> <input type="button"/>																					
Line Items <table border="1"> <thead> <tr> <th>Line</th> <th>Part</th> <th>Description</th> <th>Bin</th> <th>Release Quantity</th> <th>Return Quantity</th> <th>Work Order</th> <th>Phase</th> <th>Pick Ticket</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>2416</td> <td>PVC PIPE 1" BELL END SIERRA IRG</td> <td>OS-C:2416</td> <td>3.0000</td> <td>0.0000</td> <td>10-012317</td> <td>005</td> <td>5260</td> </tr> </tbody> </table>				Line	Part	Description	Bin	Release Quantity	Return Quantity	Work Order	Phase	Pick Ticket	1	2416	PVC PIPE 1" BELL END SIERRA IRG	OS-C:2416	3.0000	0.0000	10-012317	005	5260
Line	Part	Description	Bin	Release Quantity	Return Quantity	Work Order	Phase	Pick Ticket													
1	2416	PVC PIPE 1" BELL END SIERRA IRG	OS-C:2416	3.0000	0.0000	10-012317	005	5260													

12. Click on the **Released To Zoom** icon and select the appropriate **Shop Person**.
 13. Click on the **Save** icon and the following screen will be displayed.

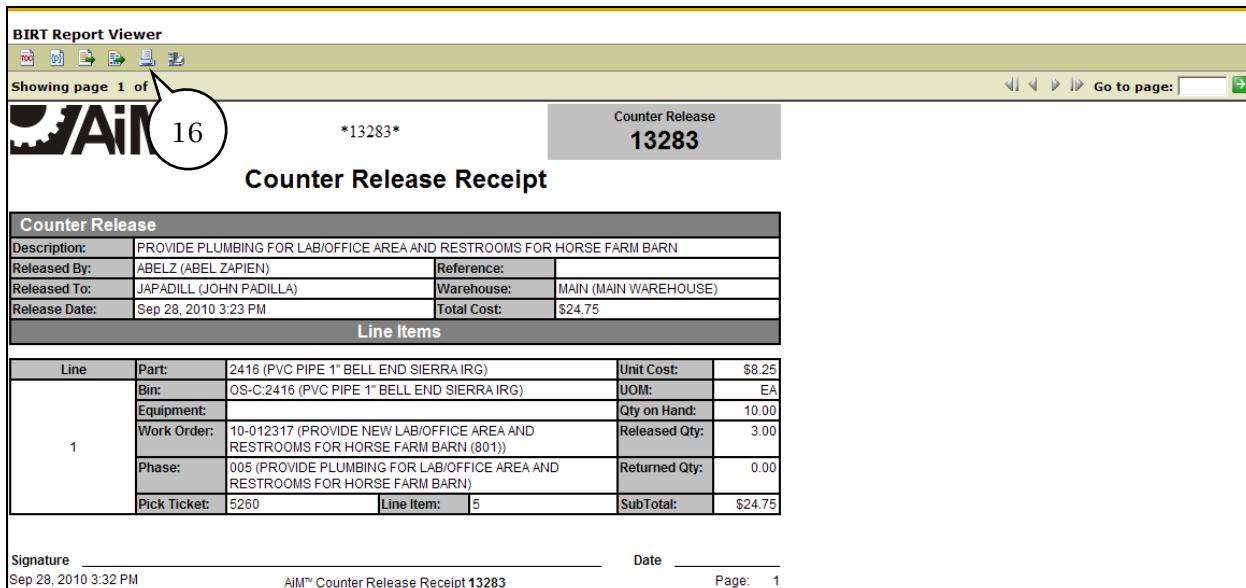
Counter Release

Transaction	13283	Editor	SREL																		
		Edit Date	Sep 28, 2010 03:28 PM																		
Description	PROVIDE PLUMBING FOR LAB/OFFICE AREA AND RESTROOMS FOR HORSE FARM BARN																				
	Reference Number																				
	Warehouse	MAIN																			
	Total Cost	\$24.75																			
Release Persons Released By: ABELZ ABEL ZAPIEN Released To: JAPADILL JOHN PADILLA 14																					
Default Work Order: <input type="text"/> <input type="button"/>																					
Line Items <table border="1"> <thead> <tr> <th>Line</th> <th>Part</th> <th>Description</th> <th>Bin</th> <th>Release Quantity</th> <th>Return Quantity</th> <th>Work Order</th> <th>Phase</th> <th>Pick Ticket</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>2416</td> <td>PVC PIPE 1" BELL END SIERRA IRG</td> <td>OS-C:2416</td> <td>3.0000</td> <td>0.0000</td> <td>10-012317</td> <td>005</td> <td>5260</td> </tr> </tbody> </table>				Line	Part	Description	Bin	Release Quantity	Return Quantity	Work Order	Phase	Pick Ticket	1	2416	PVC PIPE 1" BELL END SIERRA IRG	OS-C:2416	3.0000	0.0000	10-012317	005	5260
Line	Part	Description	Bin	Release Quantity	Return Quantity	Work Order	Phase	Pick Ticket													
1	2416	PVC PIPE 1" BELL END SIERRA IRG	OS-C:2416	3.0000	0.0000	10-012317	005	5260													

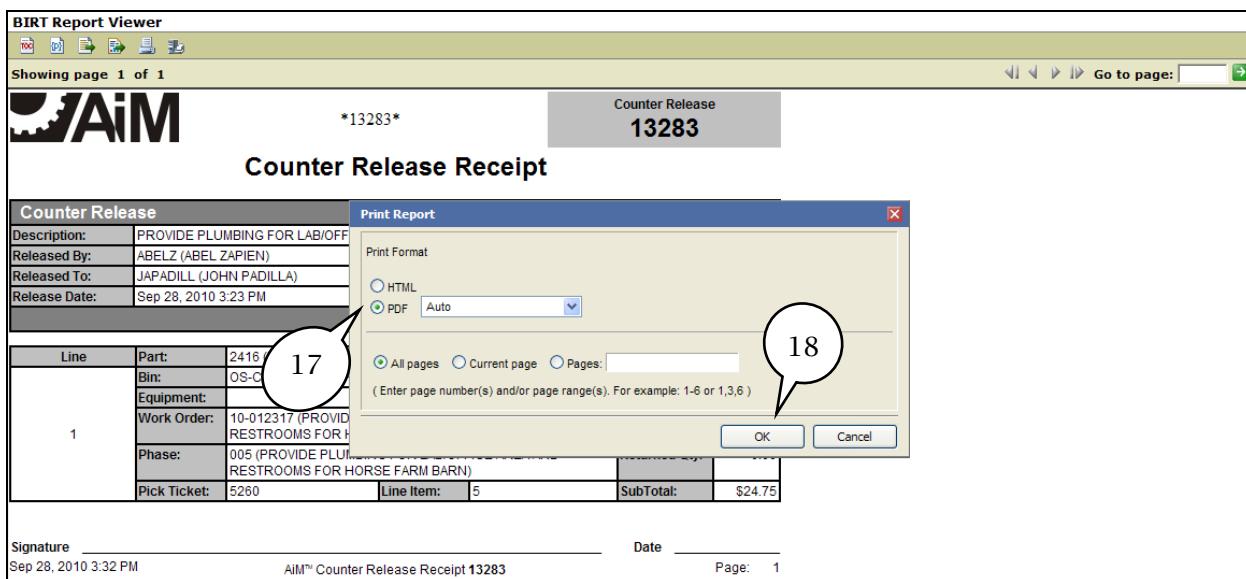
14. Click on the **Print** icon and the following screen will be displayed.



15. Click on **60-Counter Release Receipt** and the following screen will be displayed.

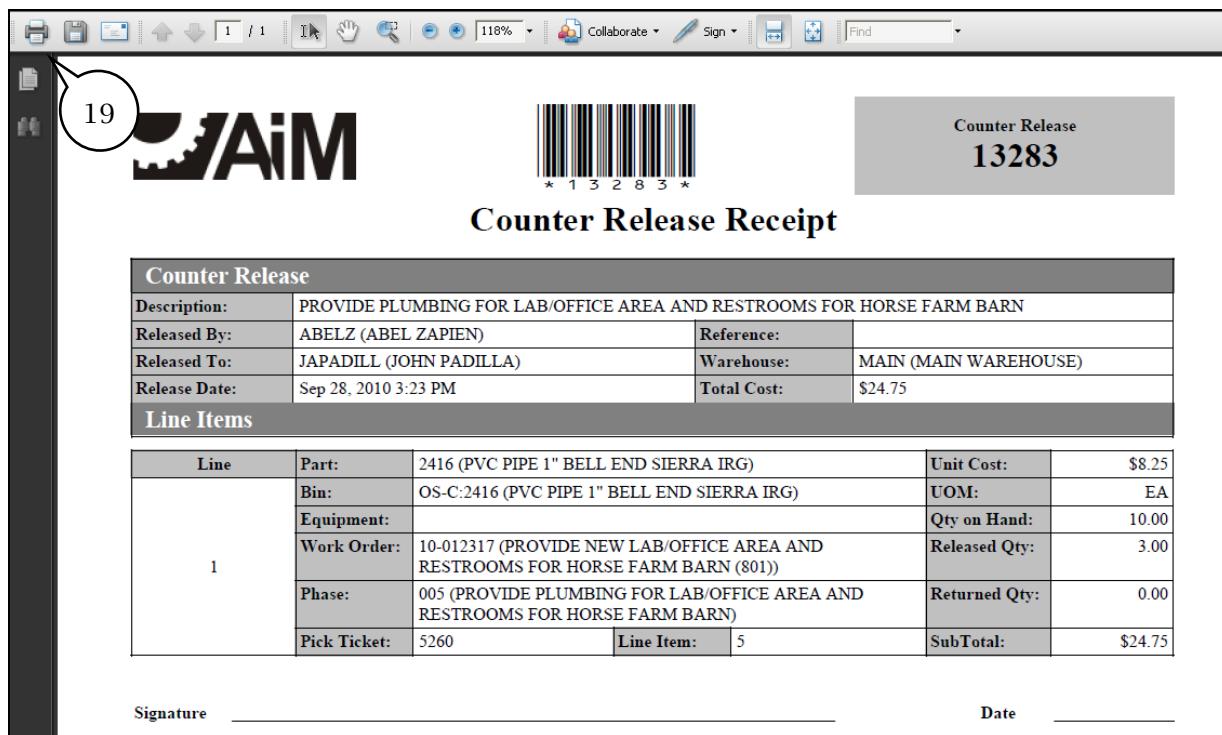


16. Click on the **Print Report** icon and the following screen will be displayed.



17. Click on the **PDF** radio button.

18. Click on the **OK** icon and the following screen will be displayed.



19. Click on the **Print** icon.

The Counter Release process is now complete!

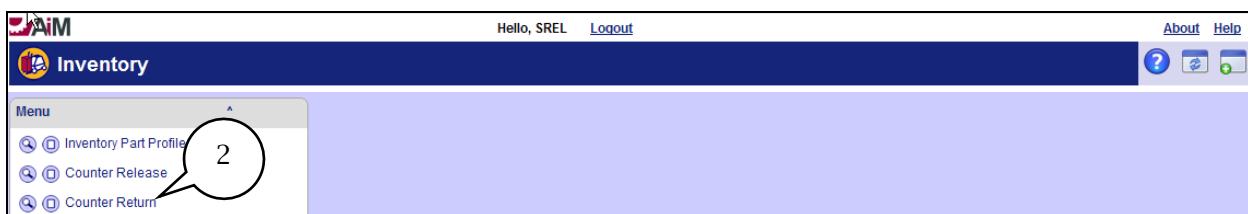
Counter Return

The following steps must be completed to return materials that were not used for a *Work Order* to the warehouse. The following is an example of returning material to a *Shop Warehouse*.

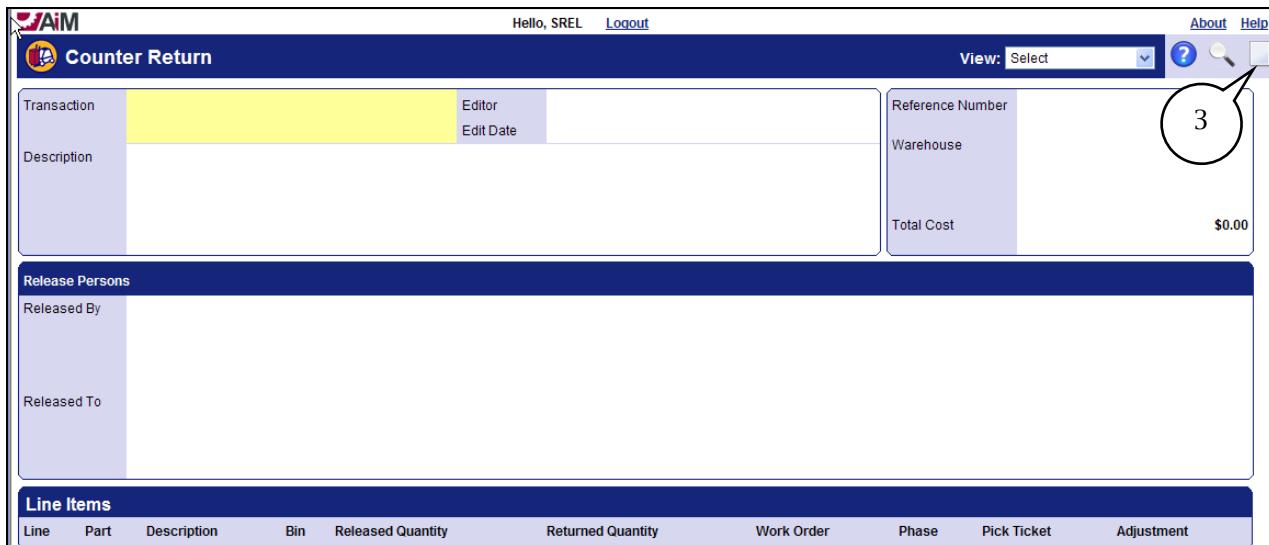
After logging on, the Aim **WorkDesk** will be displayed.



1. Select the **Inventory** module and the following drop down list will be displayed.



2. Click on **Counter Return** and the following screen will be displayed.



3. Click on the **New** icon and the following screen will be displayed.

Counter Release Transaction Search

Counter Release

Transaction	<input type="text"/>	<input type="button" value="="/>	<input type="text"/>
Trans Date	<input type="text"/>	<input type="button" value="="/>	<input type="text"/>
Description	<input type="text"/>	<input type="button" value="="/>	<input type="text"/>
Warehouse	<input type="text"/>	<input type="button" value="="/>	<input type="text"/>
Released By	<input type="text"/>	<input type="button" value="="/>	<input type="text"/>
Released To	<input type="text"/>	<input type="button" value="="/>	<input type="text"/>
Reference Number	<input type="text"/>	<input type="button" value="="/>	<input type="text"/>
Editor	<input type="text"/>	<input type="button" value="="/>	<input type="text"/>
Edit Date	<input type="text"/>	<input type="button" value="="/>	<input type="text"/>
Extra Description	<input type="text"/>	<input type="button" value="="/>	<input type="text"/>

Counter Release Line Item

- Type in a **Transaction** number or conduct a *Search* as described in the *Performing a Search Query* section.
- Click the **Execute Search** icon, select the desired **Transaction**, and the following screen will be displayed.

Counter Return

Transaction	5015	Editor	RUPAZ							
		Edit Date	Dec 16, 2009 12:15 PM							
Description	ROOF LEAKING HARDMAN HALL 210K, 212 AND 216. WATER DAMAGE CEILING									
	Reference Number									
	Warehouse	MAIN								
	MAIN WAREHOUSE									
	Total Cost	\$83.88								
Release Persons										
Released By	RUPAZ	Return Persons Default								
	RUMALDO PAZ	Returned By	<input type="text"/>							
Released To	ALZAMORA	Returned To	<input type="text"/>							
	ALONZO ZAMORA									
Line Item										
Line	Item	Description	Bin	Released Quantity	Returned Quantity	Work Order	Phase	Pick Ticket	Adjustment	Return All
1	4444	PNT CAULK VIP SMOOTH 5710 KWAL-HANLEY #5710	35-6B2-4444	12.0000	0.0000	10-001239	001	1007		<input type="button" value="Return All"/>

- Click on the **Line Item** number and the following screen will be displayed.

7. Enter a number in the **Return Quantity** field.
8. Click on the **Returned By Zoom** icon and select the appropriate **Employee ID**.
9. Click on the **Returned To Zoom** icon and select the appropriate **Employee ID**.
10. Click on the **Done** icon and the following screen will be displayed.

11. Click on the **Save** icon and the following screen will be displayed.

Counter Return

Transaction	5015	Editor	RUPAZ	View: Select	?	Print	Help		
Description	ROOF LEAKING HARDMAN HALL 210K, 212 AND 216. WATER DAMAGE CEALING			Reference Number	12				
		Warehouse	MAIN	MAIN WAREHOUSE					
		Total Cost	\$76.89						
Release Persons									
Released By	RUPAZ								
	RUMALDO PAZ								
Released To	ALZAMORA								
	ALONZO ZAMORA								
Line Items									
Line	Part	Description	Bin	Released Quantity	Returned Quantity	Work Order	Phase	Pick Ticket	Adjustment
2	4444	PNT CAULK VIP SMOOTH 5710 KWAL-HANLEY #5710	35-8B2:4444	12.0000	-1.0000	10-001239	001	1007	1

12. Click on the **Print** icon to print a copy of the *Counter Return*.

The Counter Return process is now complete!

Creating a Work Order

There are times when OFS personnel, other than employees working the OFS Work Order desk, need to create a **Work Order** that is not initiated as the result of a **Customer Request**. The following steps must be completed to create a **Work Order**.

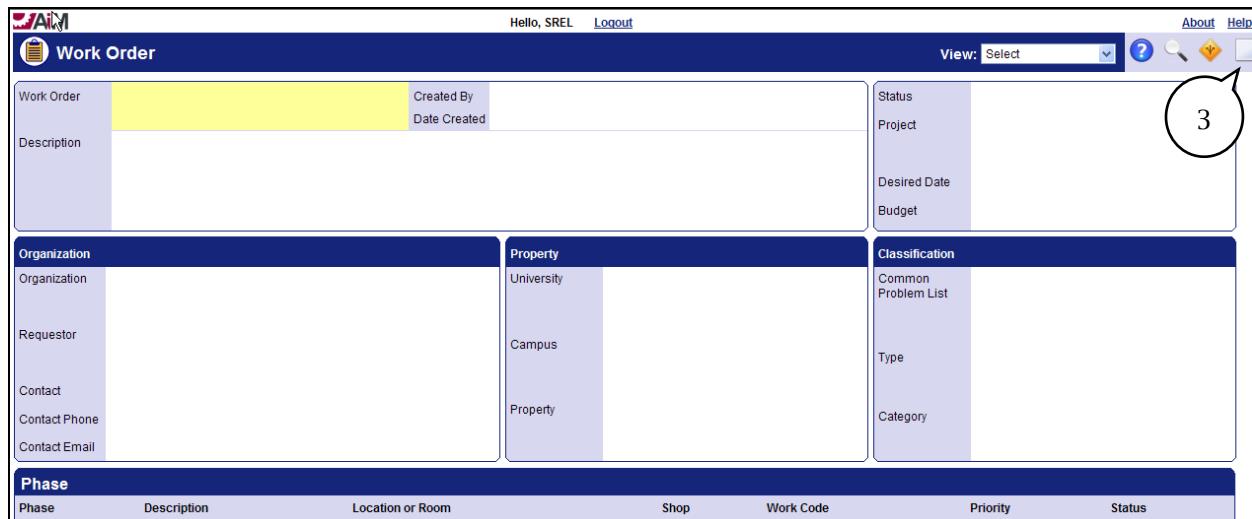
1. Select the **Work Management** module and the following list will be displayed.

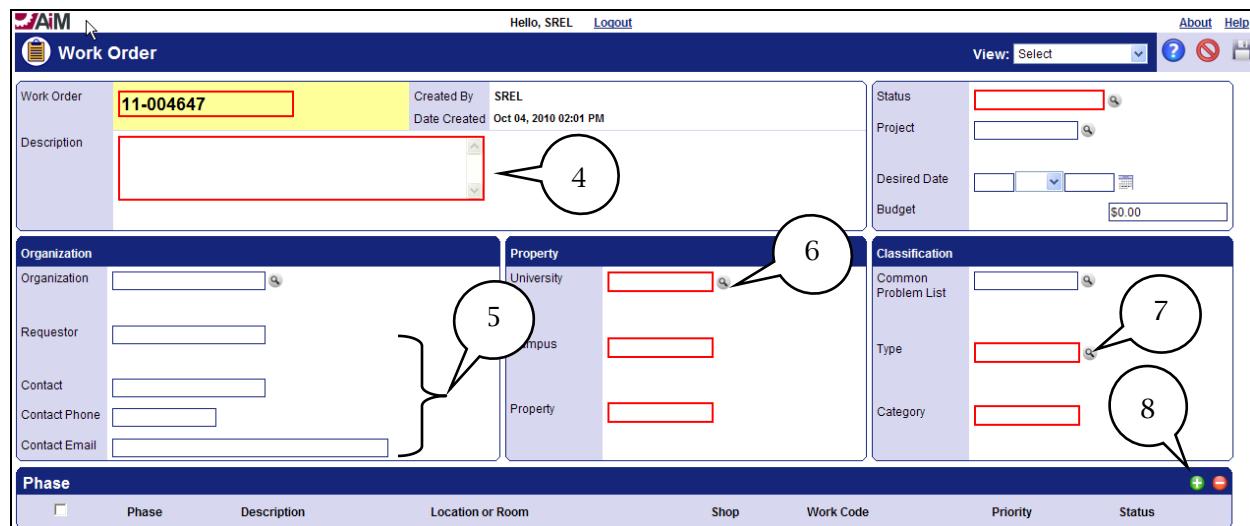


2. Click on **Work Order** and the following screen will be displayed.



3. Click on the **New** icon and the following screen will be displayed.





The screenshot shows the 'Work Order' creation interface. At the top, a yellow header box contains the work order number '11-004647'. To the right of this are 'Created By' (SREL) and 'Date Created' (Oct 04, 2010 02:01 PM). Below the header, there are four main sections: 'Organization' (with fields for Organization, Requestor, Contact, Contact Phone, and Contact Email), 'Property' (with fields for University, Campus, and Property), 'Classification' (with fields for Status, Project, Desired Date, Budget, Common Problem List, Type, and Category), and a 'Phase' table at the bottom. Callouts numbered 4 through 8 point to various fields and sections on the screen.

4. Type in a description of the work to be performed in the **Description** field.
5. Enter a **Contact** name, **Contact Phone**, and **Contact Email**.
6. Select the **University**, **Campus**, and **Property** by clicking on the **Zoom** icon. Use the *Search* feature to select the *Property*.

Note: Recommend selecting the word “contains” from the drop down list to the left of the *Description* field in the *Search* screen. Once the building name appears, select the desired number to populate the *Property* field. Initially, this is a drill down process; once familiar with the *Property* number it can be entered directly, then click on the **Zoom** icon to validate and populate the *Property* block fields.

7. Click on the **Type Zoom** icon and make a selection, then make a **Category** selection. After making these selections the **Status** field will populate to the *Open* status.
8. Click on the **Add Phase** (green plus sign) icon and the following screen will be displayed.

This screenshot shows the 'Phase' creation screen in AiM 4.1. The interface is divided into several sections: Phase (001), Description (DOORS AND KEY PROBLEM), Status (NEW), Work Order (11-004649), Classification (Funding Source: Shop), Equipment (Equipment, Equipment Group, Template, PM Standards), Asset (Asset, Asset Type, Asset Group), and Contractor (Type). Numbered callouts point to specific fields: 9 points to the Shop field in the Equipment section; 10 points to the Priority field in the Phase section; 11 points to the Funding Source dropdown in the Classification section; 12 points to the Work Order number in the Status section; 13 points to the Work Code field in the Classification section; 14 points to the Status dropdown in the top right; and 15 points to the Work Order number in the top right.

9. Click on the **Shop Zoom** icon and make a selection.
10. Click on the **Priority Zoom** icon and make a selection.
11. **Funding Source** will automatically populate to *Shop* and should only be changed if directed by OFS Accounting by clicking on the arrow and making the appropriate selection.
12. Click on the **Status Zoom** icon and select **Assigned**.
13. Click on the **Work Code Zoom** icon and make a selection.
14. Click on the **Done** icon and the following screen will be displayed.

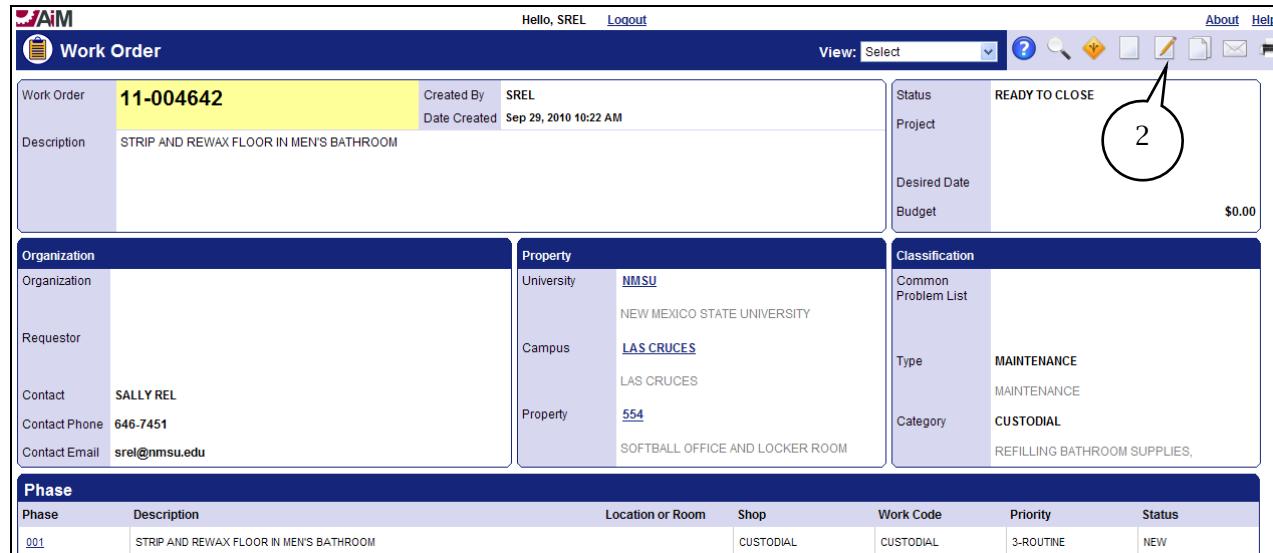
This screenshot shows the 'Work Order' creation screen in AiM 4.1. The interface is divided into several sections: Work Order (11-004649), Description (DOORS AND KEY PROBLEM), Status (OPEN), Project (empty), Desired Date (empty), and Budget (\$0.00). Organization (Organization, Requestor, Contact, Contact Phone, Contact Email), Property (University: NMSU, Campus: LAS CRUCES, Property: 126, COMPUTER CENTER), Classification (Common Problem List, Type: MAINTENANCE, Category: ACCESS), and Phase (Phase: 001, Description: DOORS AND KEY PROBLEM, Location or Room: CUSTODIAL, Shop: CUSTODIAL, Work Code: X0012, Priority: 2-URGENT, Status: NEW). Numbered callouts point to specific fields: 15 points to the Work Order number in the top right.

15. Click on the **Save** icon, then a copy of the *Work Order* can be printed.
The Creating a Work Order process is now complete!

Creating a New Phase for an existing Work Order

Only one OFS Shop can order materials, charge time, etc. to any *Phase* of a *Work Order*. Therefore, if another Shop needs to conduct work on a *Work Order*, a new *Phase* must be created by completing the following steps.

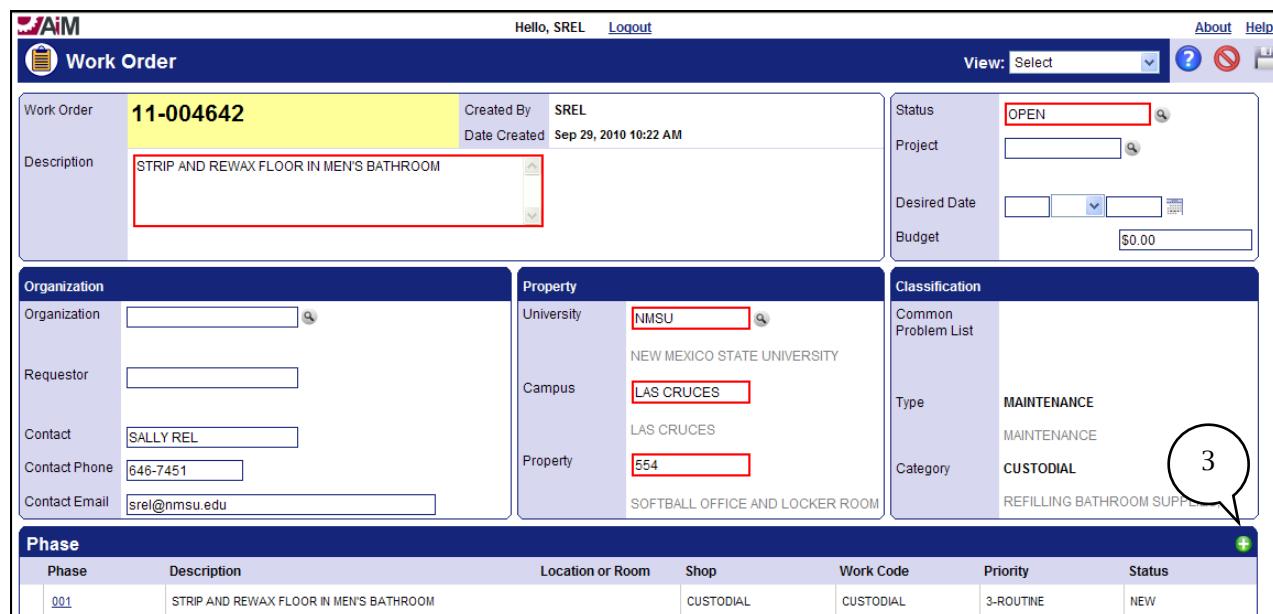
1. Use the **Search** feature to locate and open the *Work Order*, and the following screen will be displayed.



The screenshot shows the AiM Work Order interface. At the top, the work order number **11-004642** is highlighted in yellow. In the top right corner, there is a status indicator **READY TO CLOSE** with a circled '2' to its right. The interface includes sections for Organization, Property, and Classification, each with various fields and dropdown menus. At the bottom, there is a table for the **Phase** section with one row currently listed.

Phase	Description	Location or Room	Shop	Work Code	Priority	Status
001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

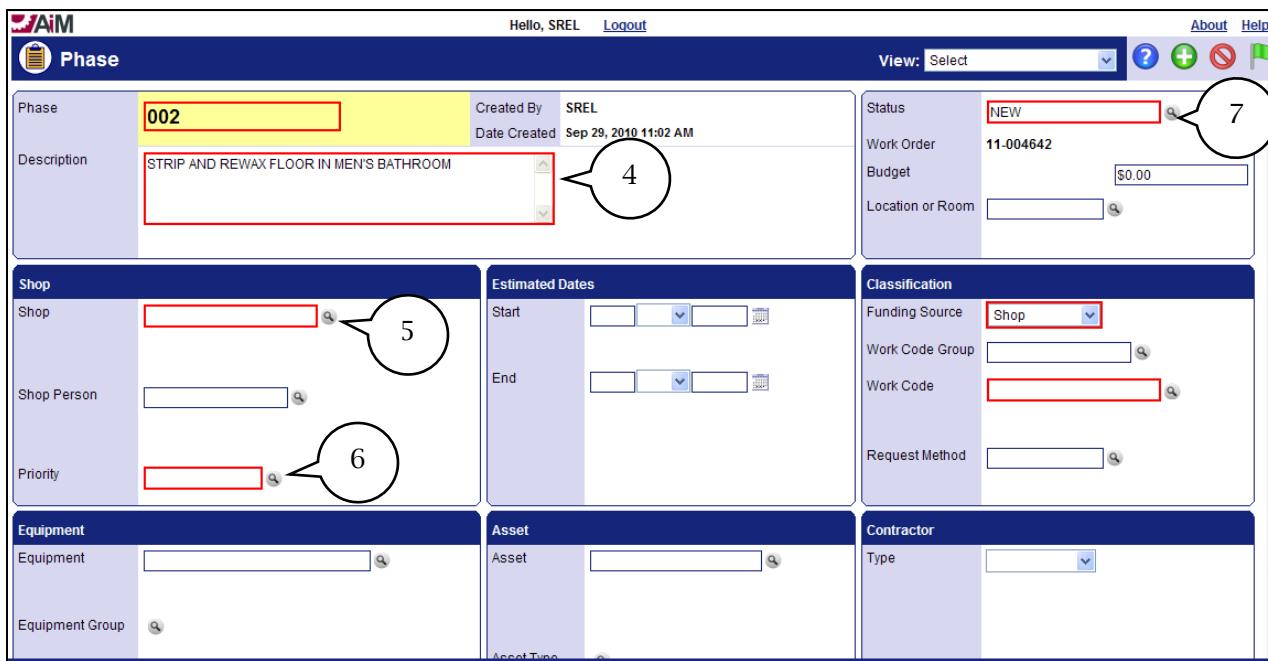
2. Click on the **Edit** icon and the following screen will be displayed.



The screenshot shows the same AiM Work Order interface as the previous one, but with the **Status** field highlighted in red. A circled '3' is located in the bottom right corner of the screen. The interface and table structure are identical to the first screenshot.

Phase	Description	Location or Room	Shop	Work Code	Priority	Status
001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

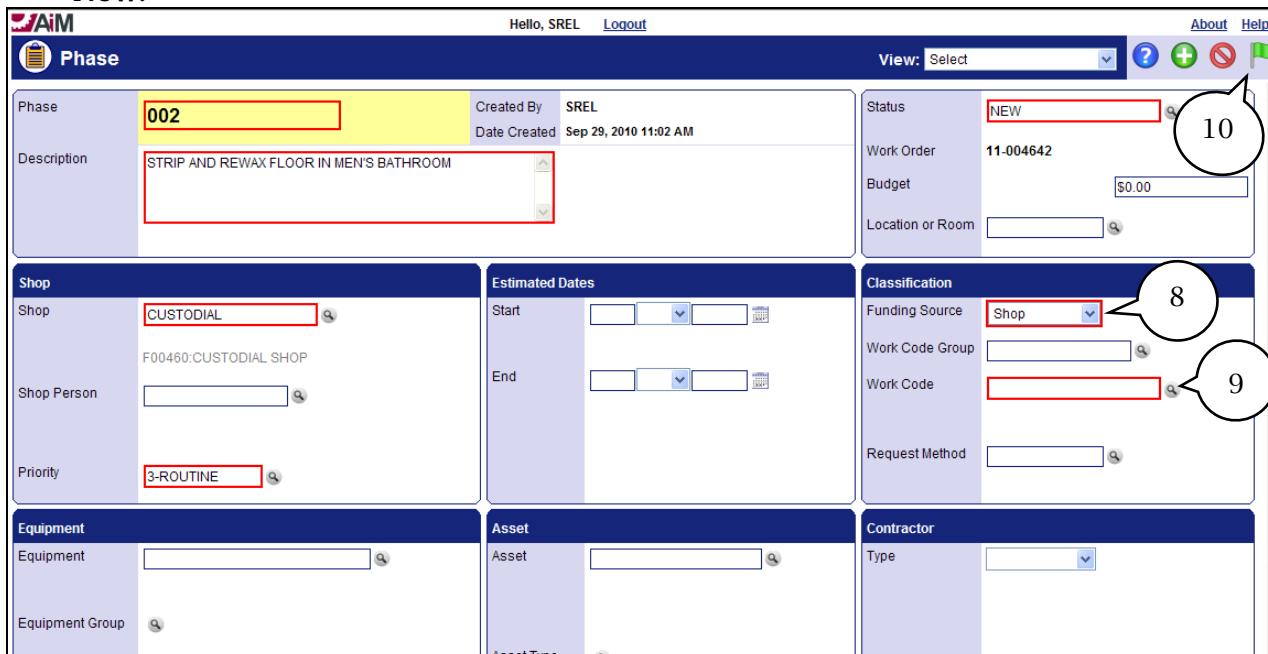
3. Click on the **Add Phase** icon and the following screen will be displayed.



Phase 002
Description STRIP AND REWAX FLOOR IN MEN'S BATHROOM
Status NEW
Work Order 11-004642
Budget \$0.00
Location or Room

Shop Shop Person Priority
Estimated Dates Start End
Classification Funding Source Shop Work Code Group Work Code Request Method
Equipment Equipment Equipment Group Asset Asset Type
Contractor Type

4. Type in a description of the work needed for the new **Phase** in the **Description** field.
5. Click on the **Shop Zoom** icon and select the desired **Shop**.
6. Click on the **Priority Zoom** icon and make a selection.
7. The **Status** field should default to **New**; if not, click on the **Zoom** icon and select **New**.



Phase 002
Description STRIP AND REWAX FLOOR IN MEN'S BATHROOM
Status NEW
Work Order 11-004642
Budget \$0.00
Location or Room

Shop Shop Person Priority
Estimated Dates Start End
Classification Funding Source Shop Work Code Group Work Code Request Method
Equipment Equipment Equipment Group Asset Asset Type
Contractor Type

8. The **Funding Source** field defaults to **Shop** and should only be changed if directed by OFS Accounting by clicking on the arrow and making the appropriate selection.
9. Click on **Work Code Zoom** icon and make a selection.

10. Click on the **Done** icon and the following screen, which reflects the new *Phase*, will be displayed.

The screenshot shows the AiM Work Order interface. At the top, it displays 'Hello, SREL' and 'Logout'. The main area is titled 'Work Order' with the ID '11-004642'. The 'Status' field is highlighted with a red box and has the value 'OPEN'. A callout bubble with the number '11' points to this field. Other fields shown include 'Created By' (SREL), 'Date Created' (Sep 29, 2010 10:22 AM), 'Project' (empty), 'Desired Date' (empty), and 'Budget' (\$0.00). Below these are sections for 'Organization' (Requestor: SALLY REL, Contact: SALLY REL, Contact Phone: 646-7451, Contact Email: srel@nmsu.edu), 'Property' (University: NMSU, Campus: LAS CRUCES, Property: 554), and 'Classification' (Common Problem List: empty, Type: MAINTENANCE, Category: CUSTODIAL). The 'Phase' section at the bottom lists two phases: '001' and '002', both with the description 'STRIP AND REWAX FLOOR IN MEN'S BATHROOM', 'Location or Room' (empty), 'Shop' (CUSTODIAL), 'Work Code' (CUSTODIAL), 'Priority' (3-ROUTINE), and 'Status' (NEW).

11. Click on the **Save** icon.

The Creating a New Phase for an existing Work Order process is now complete!

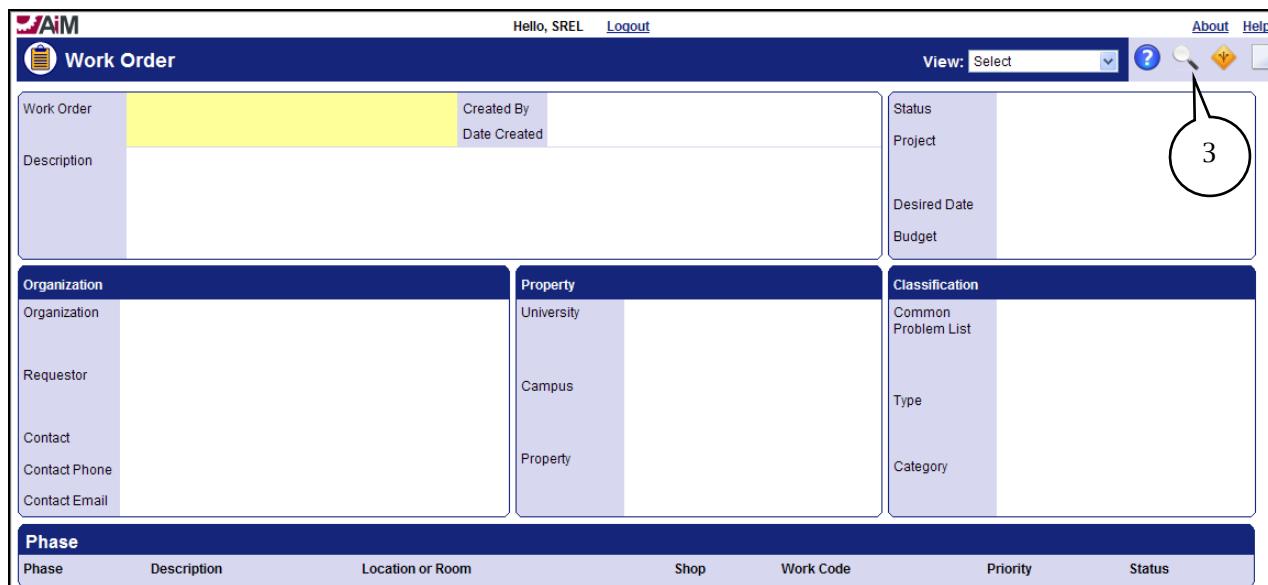
Assigning Work Orders

Upon initiation of a Work Order, **Shop Person** (employee) assignments may or may not be made by the OFS Work Order desk. The supervisor has the authority to make assignments to employees, or change assignments made by the Work Order desk. The following steps must be completed to make a **Shop Person** assignment.

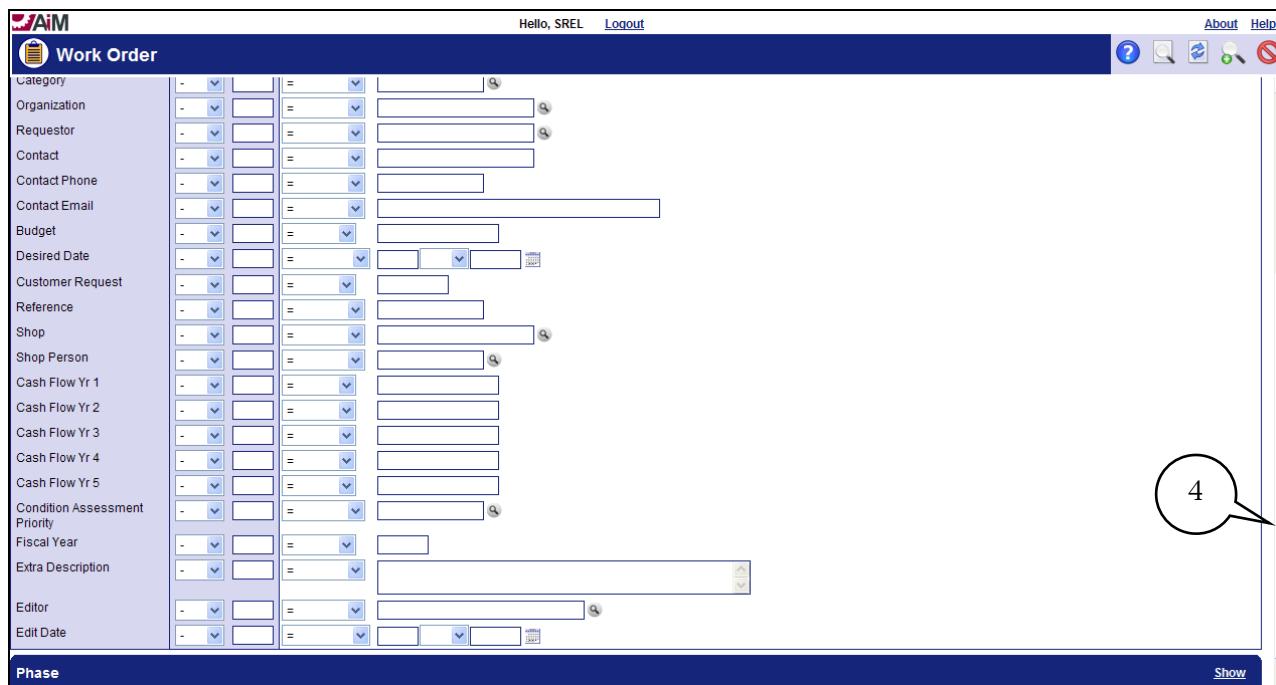
1. Select the **Work Management** module and the following drop down list will be displayed.



2. Click on **Work Order** and the following screen will be displayed.



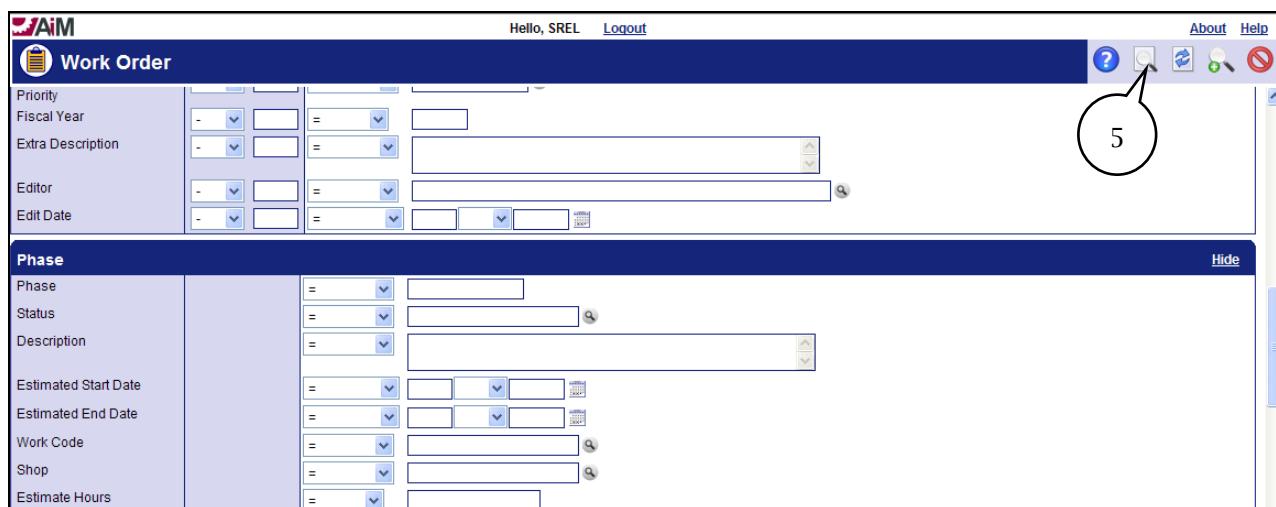
3. Click on the **Search** icon and the following screen will be displayed.



The screenshot shows the AiM Work Order interface. At the top, there are buttons for 'About' and 'Help'. Below the header, there is a large grid of input fields for various work order details. The fields include: Category, Organization, Requestor, Contact, Contact Phone, Contact Email, Budget, Desired Date, Customer Request, Reference, Shop, Shop Person, Cash Flow Yr 1, Cash Flow Yr 2, Cash Flow Yr 3, Cash Flow Yr 4, Cash Flow Yr 5, Condition Assessment, Priority, Fiscal Year, Extra Description, Editor, and Edit Date. At the bottom of the grid, there is a 'Phase' section and a 'Show' button. A callout bubble labeled '4' points to the 'Show' button.

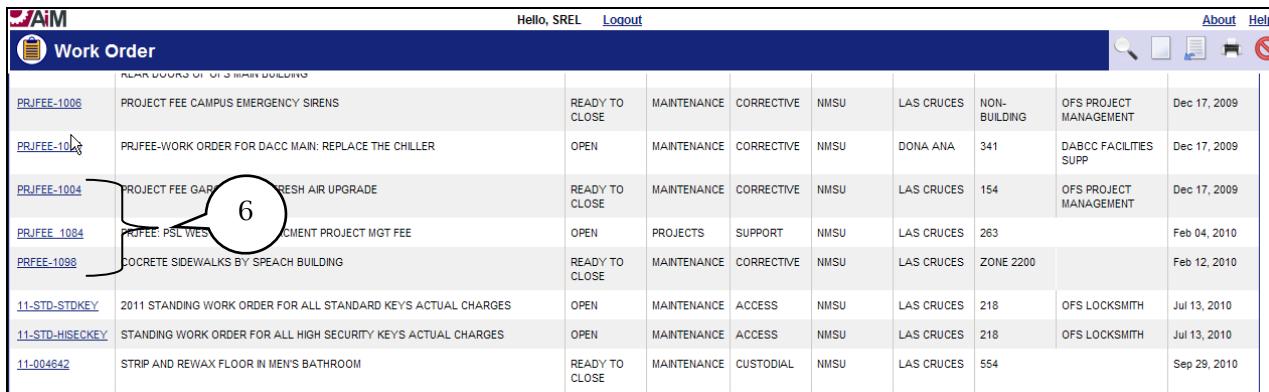
4. Use the scroll bar to move down to the **Phase** block, click on the **Shop Zoom** icon, select the appropriate **Shop** from the screen that is displayed, then the following screen will be displayed.

Note: If Phase block is not displayed click on the *Show* to display fields.



The screenshot shows the AiM Work Order interface with the 'Phase' block expanded. The top part of the screen shows the main data entry grid. Below it, the 'Phase' block is expanded, showing fields for: Phase, Status, Description, Estimated Start Date, Estimated End Date, Work Code, Shop, and Estimate Hours. A callout bubble labeled '5' points to the 'Zoom' icon in the toolbar.

5. Click on the **Execute Search** icon and the following screen will be displayed.



Work Order									
ALARMS DOORS OF CTS MAIN BUILDING									
Work Order	Description	Status	Maintenance	Corrective	NMSU	LAS CRUCES	Non-Building	OfS Project Management	Date
PRJFEE-1006	PROJECT FEE CAMPUS EMERGENCY SIRENS	READY TO CLOSE	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	NON-BUILDING	OfS PROJECT MANAGEMENT	Dec 17, 2009
PRJFEE-1008	PRJFEE-WORK ORDER FOR DACC MAIN: REPLACE THE CHILLER	OPEN	MAINTENANCE	CORRECTIVE	NMSU	DONA ANA	341	DABC FACILITIES SUPP	Dec 17, 2009
PRJFEE-1004	PROJECT FEE GARAGE FRESH AIR UPGRADE	READY TO CLOSE	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	154	OfS PROJECT MANAGEMENT	Dec 17, 2009
PRJFEE-1084	PROJECT FEE: PSL WEST CEMENT PROJECT MGT FEE	OPEN	PROJECTS	SUPPORT	NMSU	LAS CRUCES	263		Feb 04, 2010
PRJFEE-1098	CONCRETE SIDEWALKS BY SPEACH BUILDING	READY TO CLOSE	MAINTENANCE	CORRECTIVE	NMSU	LAS CRUCES	ZONE 2200		Feb 12, 2010
11-STD-STDKEY	2011 STANDING WORK ORDER FOR ALL STANDARD KEYS ACTUAL CHARGES	OPEN	MAINTENANCE	ACCESS	NMSU	LAS CRUCES	218	OfS LOCKSMITH	Jul 13, 2010
11-STD-HISECKEY	STANDING WORK ORDER FOR ALL HIGH SECURITY KEYS ACTUAL CHARGES	OPEN	MAINTENANCE	ACCESS	NMSU	LAS CRUCES	218	OfS LOCKSMITH	Jul 13, 2010
11-004642	STRIP AND REWAX FLOOR IN MEN'S BATHROOM	READY TO CLOSE	MAINTENANCE	CUSTODIAL	NMSU	LAS CRUCES	554		Sep 29, 2010

6. Click on the desired **Work Order** number and the following screen will be displayed.



Supervisors can create a *Personal Query* link for quick access to **Work Orders** assigned to their shops.

7

Work Order **11-004642** Created By SREL Date Created Sep 29, 2010 10:22 AM

Description STRIP AND REWAX FLOOR IN MEN'S BATHROOM

Status	OPEN
Project	
Desired Date	
Budget	\$0.00

Organization		Property		Classification	
Organization		University	NMSU NEW MEXICO STATE UNIVERSITY	Common Problem List	
Requestor		Campus	LAS CRUCES	Type	MAINTENANCE
Contact	SALLY REL	Property	LAS CRUCES	Category	MAINTENANCE
Contact Phone	646-7451		554		CUSTODIAL
Contact Email	srel@nmsu.edu		SOFTBALL OFFICE AND LOCKER ROOM		REFILLING BATHROOM SUPPLIES,

Phase						
Phase	Description	Location or Room	Shop	Work Code	Priority	Status
001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

7. Click on the **Edit** icon and the following screen will be displayed.

8

Work Order **11-004642** Created By SREL Date Created Sep 29, 2010 10:22 AM

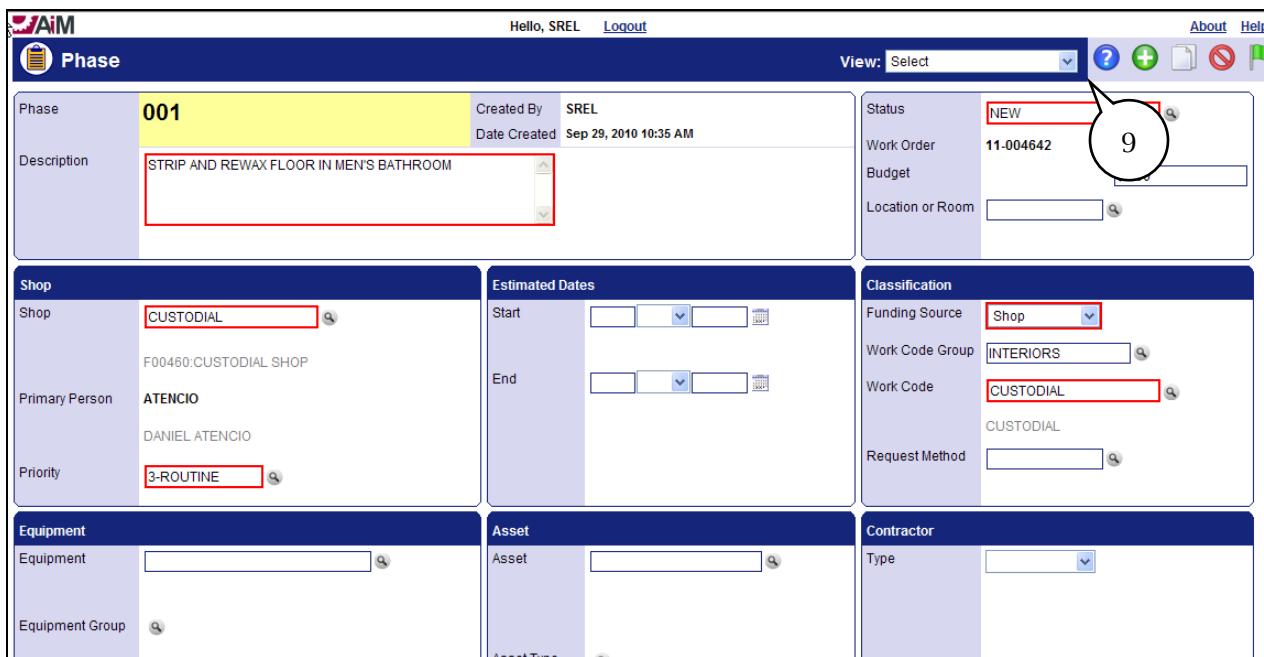
Description STRIP AND REWAX FLOOR IN MEN'S BATHROOM

Status	OPEN
Project	
Desired Date	
Budget	\$0.00

Organization		Property		Classification	
Organization		University	NMSU	Common Problem List	
Requestor		Campus	LAS CRUCES	Type	MAINTENANCE
Contact	SALLY REL	Property	LAS CRUCES	Category	MAINTENANCE
Contact Phone	646-7451		554		CUSTODIAL
Contact Email	srel@nmsu.edu		SOFTBALL OFFICE AND LOCKER ROOM		REFILLING BATHROOM SUPPLIES,

Phase						
Phase	Description	Location or Room	Shop	Work Code	Priority	Status
001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

8. Click on the desired **Phase** number and the following screen will be displayed.



Phase 001
Description STRIP AND REWAX FLOOR IN MEN'S BATHROOM

Status NEW
Work Order 11-004642
Budget
Location or Room

Shop
Shop CUSTODIAL
Primary Person ATENCIO
Priority 3-ROUTINE

Estimated Dates
Start [] End []

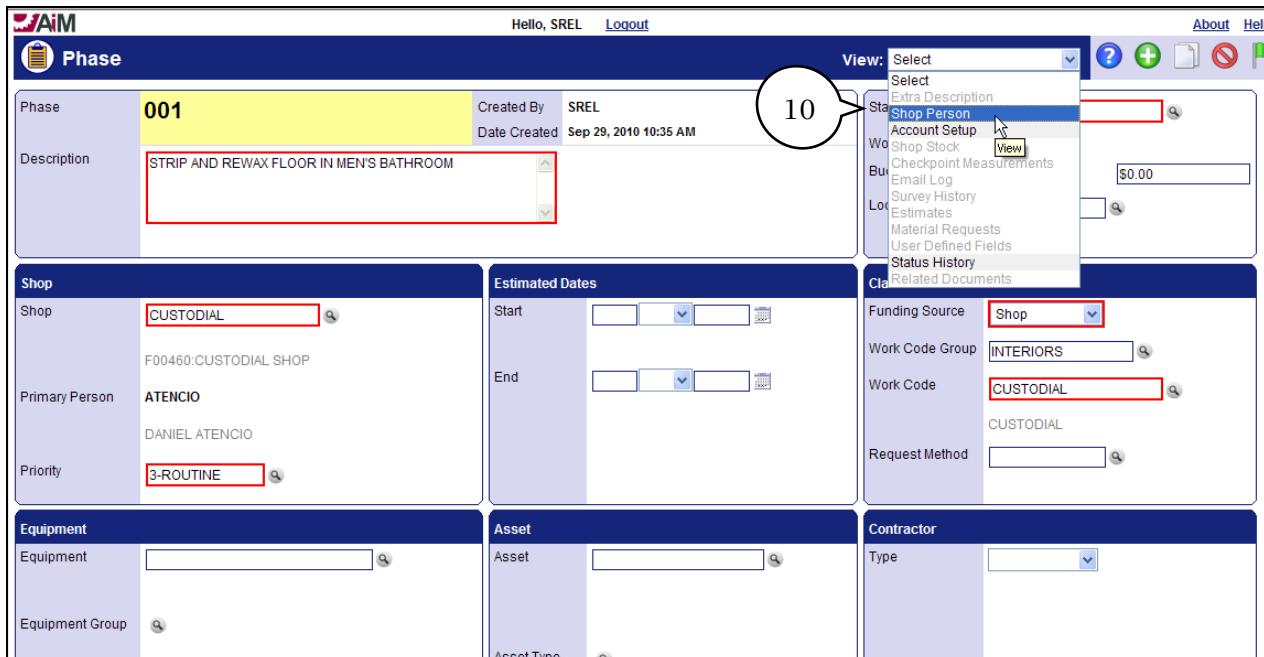
Classification
Funding Source Shop
Work Code Group INTERIORS
Work Code CUSTODIAL
Request Method

Equipment
Equipment []
Equipment Group []

Asset Asset [] Asset Type []

Contractor Type []

9. Click on the desired **View Select** field arrow and the following screen will be displayed.



Phase 001
Description STRIP AND REWAX FLOOR IN MEN'S BATHROOM

Status []
Select
Shop Person
Account Setup
Shop Stock
Checkpoint Measurements
Email Log
Survey History
Estimates
Material Requests
User Defined Fields
Status History
Related Documents

Shop
Shop CUSTODIAL
Primary Person ATENCIO
Priority 3-ROUTINE

Estimated Dates
Start [] End []

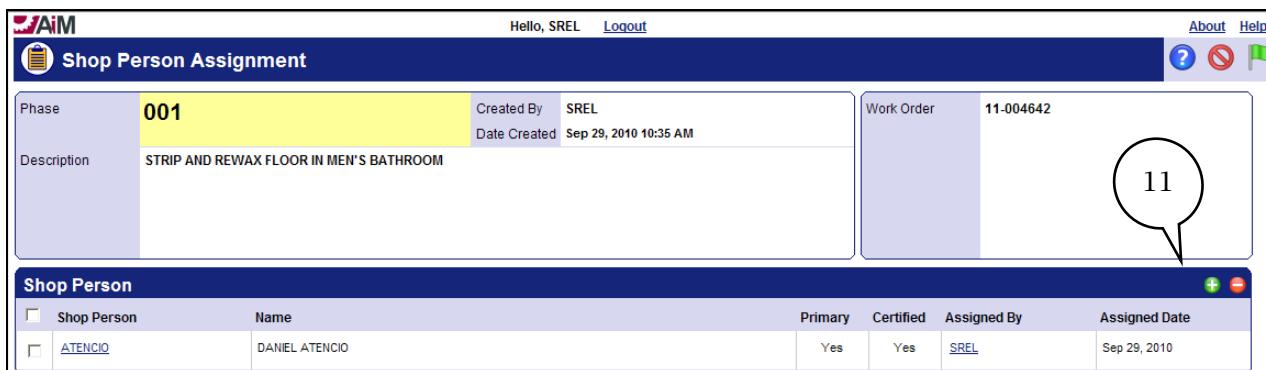
Classification
Funding Source Shop
Work Code Group INTERIORS
Work Code CUSTODIAL
Request Method

Equipment
Equipment []
Equipment Group []

Asset Asset [] Asset Type []

Contractor Type []

10. Click on the **Shop Person** field arrow and the following screen will be displayed.



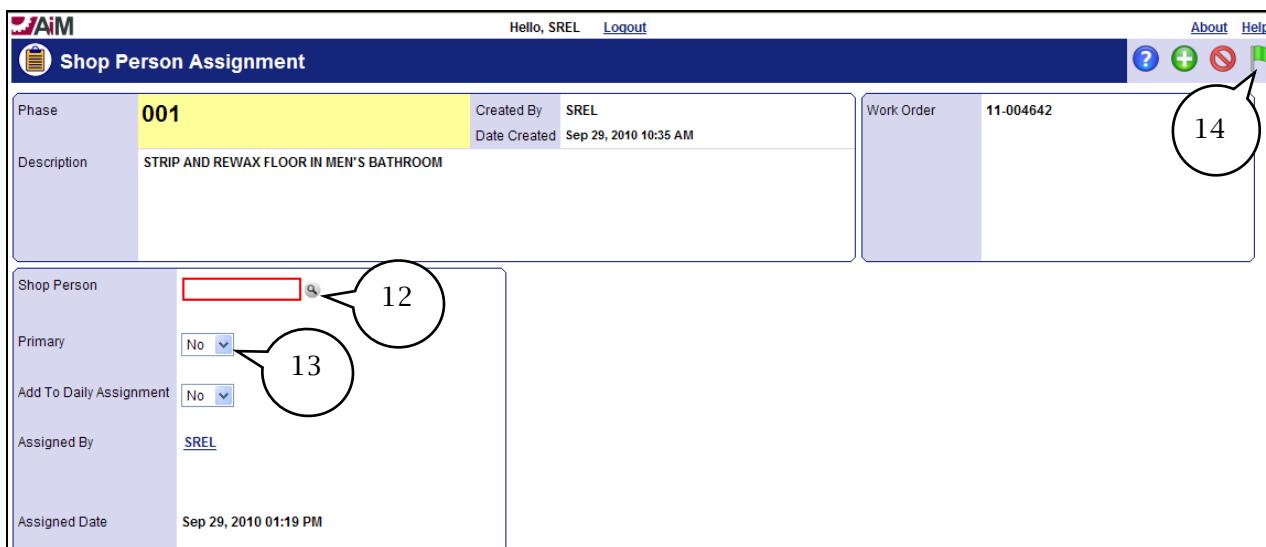
Shop Person Assignment

Phase	001	Created By	SREL
Description	STRIP AND REWAX FLOOR IN MEN'S BATHROOM	Date Created	Sep 29, 2010 10:35 AM
		Work Order	11-004642

Shop Person

Shop Person	Name	Primary	Certified	Assigned By	Assigned Date
ATENCIO	DANIEL ATENCIO	Yes	Yes	SREL	Sep 29, 2010

11. Click on the **Add Shop Person** icon and the following screen will be displayed.



Shop Person Assignment

Phase	001	Created By	SREL
Description	STRIP AND REWAX FLOOR IN MEN'S BATHROOM	Date Created	Sep 29, 2010 10:35 AM
Work Order	11-004642		

Shop Person

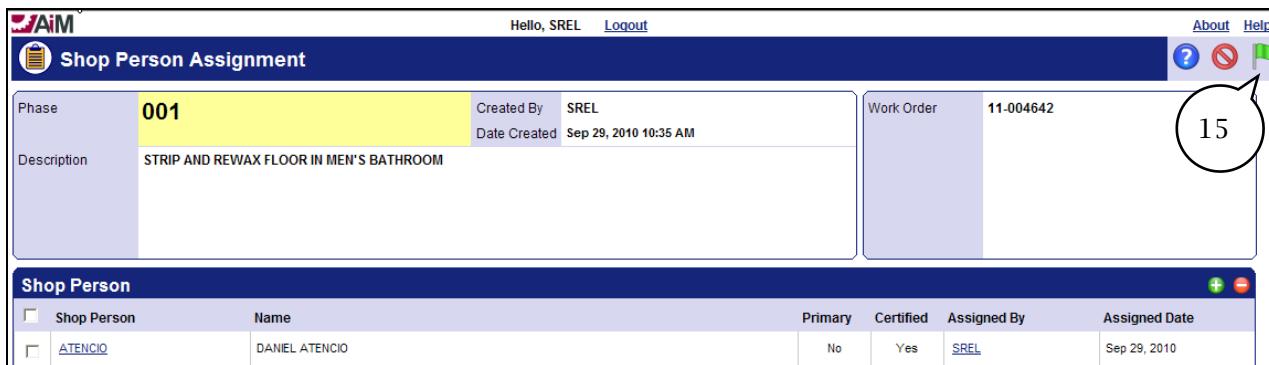
Shop Person	<input type="text" value=""/>
Primary	<input type="button" value="No"/>
Add To Daily Assignment	<input type="button" value="No"/>
Assigned By	SREL
Assigned Date	Sep 29, 2010 01:19 PM

12. Enter employee **Username** in **Shop Person** field then click the **Zoom** icon which will validate and populate the field if the **Username** is correct or click on the **Zoom** icon and select the appropriate **Employee ID**, or use the **Search** feature described in the *Performing a Search Query* section.

13. Click on the **Primary** field arrow, and select **Yes**, if **Shop Person** selected is going to be designated as the **Primary**.

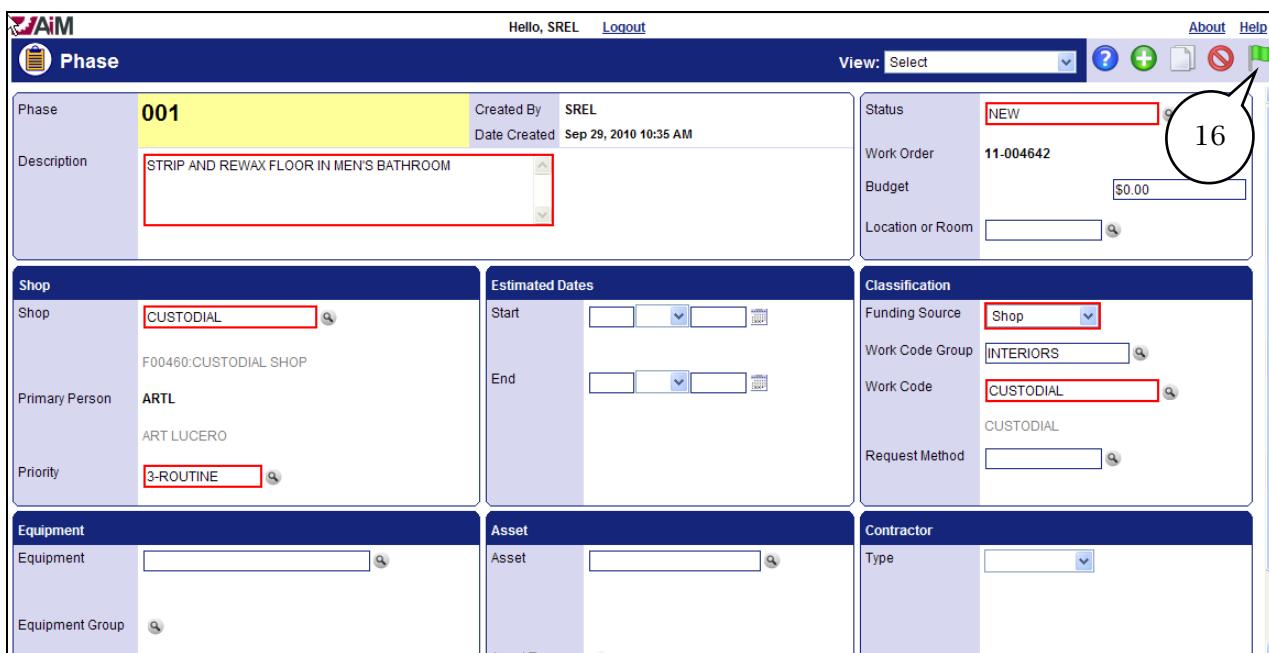
14. Click on the **Done** icon and the following screen, reflecting the **Shop Person** assignment, will be displayed.

Note: Additional employees can be assigned to a **Phase**; however, only one employee can be designated as the **Primary Shop Person** for any specific **Phase** of a **Work Order**.



Phase	001	Created By	SREL
Description	STRIP AND REWAX FLOOR IN MEN'S BATHROOM	Date Created	Sep 29, 2010 10:35 AM
Work Order	11-004642	15	
Shop Person			
Shop Person	Name	Primary	Certified
ATENCIO	DANIEL ATENCIO	No	Yes
Assigned By	SREL	Assigned Date	Sep 29, 2010

15. Again, click on the **Done** icon and the following screen will be displayed.



Phase	001	Created By	SREL
Description	STRIP AND REWAX FLOOR IN MEN'S BATHROOM	Date Created	Sep 29, 2010 10:35 AM
Status	NEW	16	
Work Order	11-004642		
Budget	\$0.00		
Location or Room			
Shop			
Shop	CUSTODIAL		
F00460:CUSTODIAL SHOP			
Primary Person	ARTL		
ART LUCERO			
Priority	3-ROUTINE		
Estimated Dates			
Start			
End			
Classification			
Funding Source	Shop		
Work Code Group	INTERIORS		
Work Code	CUSTODIAL		
Request Method			
Equipment			
Equipment			
Equipment Group			
Asset			
Asset			
Contractor			
Type			

16. Again, click on the **Done** icon and the following screen will be displayed.

17.

Work Order	11-004642	Created By	SREL
Description	STRIP AND REWAX FLOOR IN MEN'S BATHROOM	Date Created	Sep 29, 2010 10:22 AM
		Status	OPEN
		Project	<input type="text"/>
		Desired Date	<input type="text"/>
		Budget	\$0.00
Organization Organization: <input type="text"/> Requestor: <input type="text"/> Contact: SALLY REL Contact Phone: 646-7451 Contact Email: srel@nmsu.edu		Property University: NMSU NEW MEXICO STATE UNIVERSITY Campus: LAS CRUCES LAS CRUCES Property: 554 SOFTBALL OFFICE AND LOCKER ROOM	Classification Common Problem List Type: MAINTENANCE MAINTENANCE Category: CUSTODIAL REFILLING BATHROOM SUPPLIES,
Phase Phase: 001 Description: STRIP AND REWAX FLOOR IN MEN'S BATHROOM		Location or Room: <input type="text"/> Shop: CUSTODIAL Work Code: CUSTODIAL Priority: 3-ROUTINE Status: NEW	

17. Click on the **Save** icon and the following screen will be displayed.

18.

Work Order	11-004642	Created By	SREL
Description	STRIP AND REWAX FLOOR IN MEN'S BATHROOM	Date Created	Sep 29, 2010 10:22 AM
		Status	OPEN
		Project	<input type="text"/>
		Desired Date	<input type="text"/>
		Budget	\$0.00
Organization Organization: <input type="text"/> Requestor: <input type="text"/> Contact: SALLY REL Contact Phone: 646-7451 Contact Email: srel@nmsu.edu		Property University: NMSU NEW MEXICO STATE UNIVERSITY Campus: LAS CRUCES LAS CRUCES Property: 554 SOFTBALL OFFICE AND LOCKER ROOM	Classification Common Problem List Type: MAINTENANCE MAINTENANCE Category: CUSTODIAL REFILLING BATHROOM SUPPLIES,
Phase Phase: 001 Description: STRIP AND REWAX FLOOR IN MEN'S BATHROOM		Location or Room: <input type="text"/> Shop: CUSTODIAL Work Code: CUSTODIAL Priority: 3-ROUTINE Status: NEW	

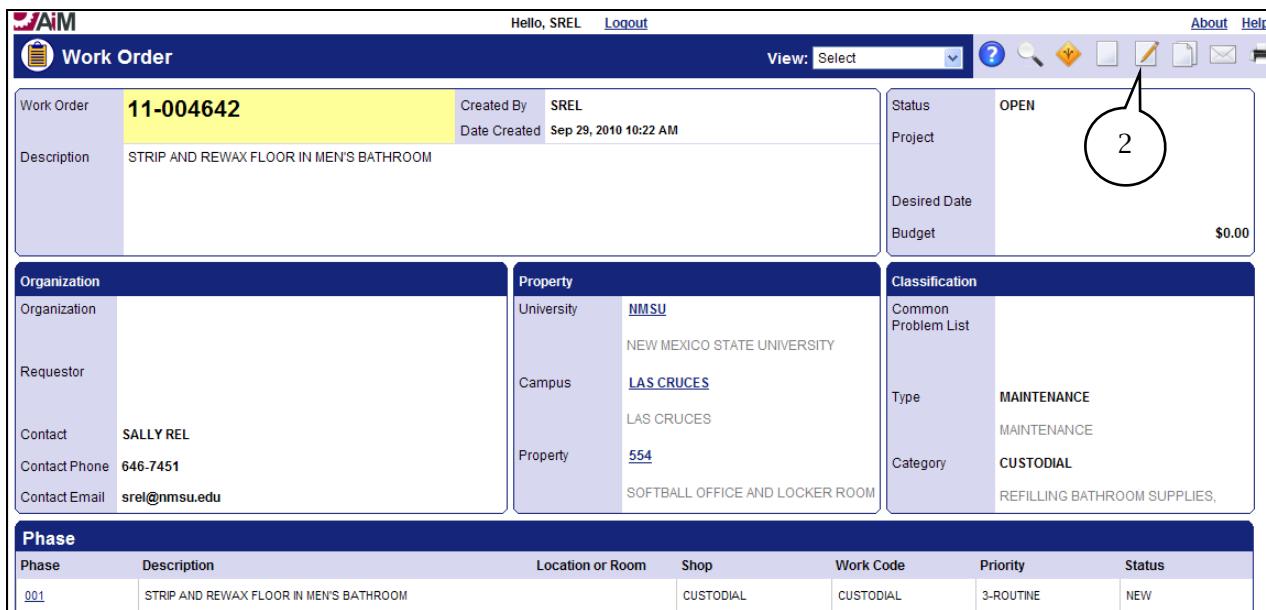
18. Click on the **Print** icon and give a copy to the employee(s) assigned to the *Work Order*.

The Assigning Work Orders process is now complete!

Closing Phases & Work Orders

When a shop has completed the work required on a **Work Order**, and **Shop Person(s)** time has been entered, the **Phase** needs to have the **Status** changed to reflect that the work has been completed. In addition, when a **Work Order** has more than one **Phase** and once they have all been completed, the **Work Order Status** must be changed by completing the following steps.

1. Using the **Search** feature, open the desired **Work Order** and the following screen will be displayed.



The screenshot shows the AiM Work Order interface. At the top, there is a header with 'Hello, SREL' and 'Logout' buttons, and a 'View: Select' dropdown. Below the header is a toolbar with various icons. The main area is divided into several sections: 'Work Order' (containing the number 11-004642 and a description of the task), 'Status' (showing 'OPEN'), 'Organization' (with fields for Requestor, Contact, Contact Phone, and Contact Email), 'Property' (with fields for University, Campus, and Property), and 'Classification' (with fields for Common Problem List, Type, and Category). At the bottom is a 'Phase' section with a table:

Phase	Description	Location or Room	Shop	Work Code	Priority	Status
001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

2. Click on the **Edit** icon and the following screen will be displayed.

Work Order

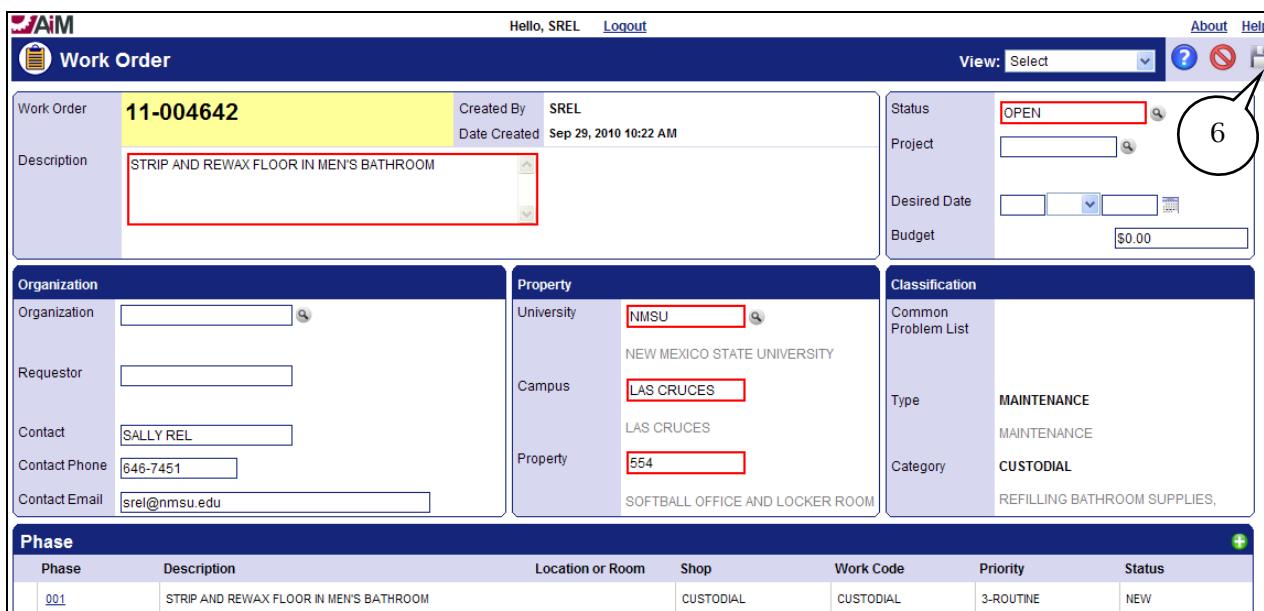
Work Order	11-004642	Created By	SREL	Status	OPEN														
Description	STRIP AND REWAX FLOOR IN MEN'S BATHROOM	Date Created	Sep 29, 2010 10:22 AM	Project															
Organization	Organization	University	NMSU	Desired Date															
Requestor		Campus	LAS CRUCES	Budget	\$0.00														
Contact	SALLY REL	Property	LAS CRUCES																
Contact Phone	646-7451		554																
Contact Email	srel@nmsu.edu		SOFTBALL OFFICE AND LOCKER ROOM																
<table border="1"> <thead> <tr> <th>Phase</th> <th>Description</th> <th>Location or Room</th> <th>Shop</th> <th>Work Code</th> <th>Priority</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>001</td> <td>STRIP AND REWAX FLOOR IN MEN'S BATHROOM</td> <td></td> <td>CUSTODIAL</td> <td>CUSTODIAL</td> <td>3-ROUTINE</td> <td>NEW</td> </tr> </tbody> </table>						Phase	Description	Location or Room	Shop	Work Code	Priority	Status	001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW
Phase	Description	Location or Room	Shop	Work Code	Priority	Status													
001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW													

3. Click on the desired **Phase** number and the following screen will be displayed.

Phase

Phase	001	Created By	SREL	Status	NEW
Description	STRIP AND REWAX FLOOR IN MEN'S BATHROOM	Date Created	Sep 29, 2010 10:35 AM	Work Order	11-004642
Shop	CUSTODIAL	Budget		Location or Room	
Primary Person	ARTL ART LUCERO	Estimated Dates	Start		
Priority	3-ROUTINE	End			
Equipment	Equipment	Asset	Asset	Classification	
Equipment Group				Funding Source	Shop
				Work Code Group	INTERIORS
				Work Code	CUSTODIAL
				Request Method	
				Contractor	
				Type	

4. Click on the **Status Zoom** icon and make the appropriate selection.
 5. Click on the **Done** icon and the following screen, reflecting the changed **Phase Status**, will be displayed.



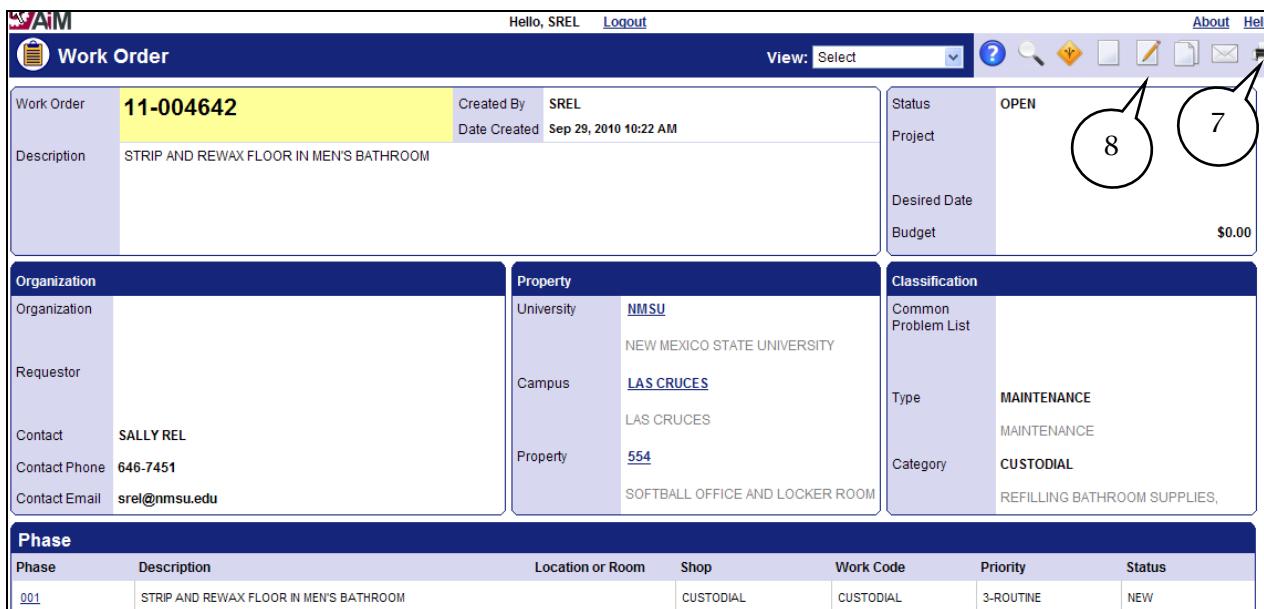
Work Order **11-004642** Created By **SREL** Date Created **Sep 29, 2010 10:22 AM**

Organization	Property	Classification
Organization	University NMSU NEW MEXICO STATE UNIVERSITY	Common Problem List
Requestor	Campus LAS CRUCES	Type MAINTENANCE
Contact	Property LAS CRUCES	MAINTENANCE
Contact Phone	554	Category CUSTODIAL
Contact Email	SOFTBALL OFFICE AND LOCKER ROOM	REFILLING BATHROOM SUPPLIES,

Phase

Phase	Description	Location or Room	Shop	Work Code	Priority	Status
001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

6. Click on the **Save** icon and the following screen will be displayed.



Work Order **11-004642** Created By **SREL** Date Created **Sep 29, 2010 10:22 AM**

Organization	Property	Classification
Organization	University NMSU NEW MEXICO STATE UNIVERSITY	Common Problem List
Requestor	Campus LAS CRUCES	Type MAINTENANCE
Contact	Property LAS CRUCES	MAINTENANCE
Contact Phone	554	Category CUSTODIAL
Contact Email	SOFTBALL OFFICE AND LOCKER ROOM	REFILLING BATHROOM SUPPLIES,

Phase

Phase	Description	Location or Room	Shop	Work Code	Priority	Status
001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW

7. Click on the **Print** icon to print a copy if needed.

8. If all *Phases* reflect a status of *Work Complete*, as represented in the screen above, the *Work Order Status* must be changed by clicking on the **Edit** icon and the following screen will be displayed.

AIM

Hello, SREL Logout About Help

Work Order

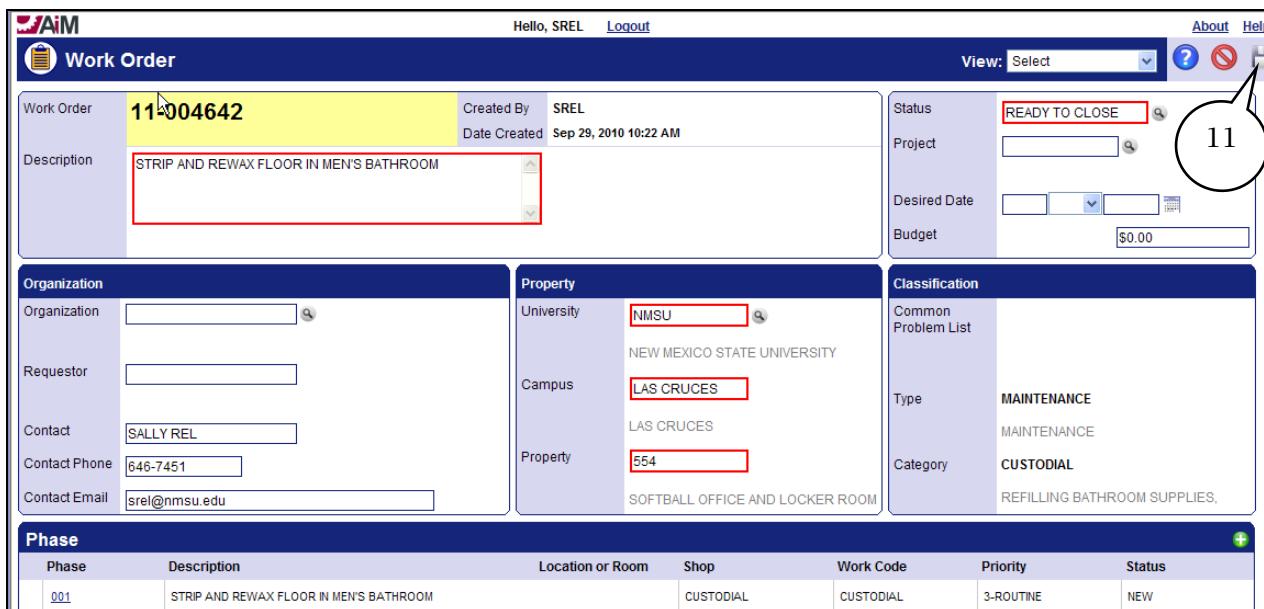
Work Order	11-004642	Created By	SREL																																			
Description	STRIP AND REWAX FLOOR IN MEN'S BATHROOM	Date Created	Sep 29, 2010 10:22 AM																																			
		Status	OPEN																																			
		Project																																				
		Desired Date																																				
		Budget	\$0.00																																			
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Organization	Property	Classification																																				
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001	STRIP AND REWAX FLOOR IN MEN'S BATHROOM		CUSTODIAL	CUSTODIAL	3-ROUTINE	NEW																																

9. Click on the **Status Zoom** icon and the following screen will be displayed.

Work Order Status

Sequence	Status	Description
10	OPEN	OPEN
20	IMMEDIATE CLOSE	IMMEDIATE CLOSE
30	READY TO CLOSE	READY TO CLOSE
40	CANCELLED	CANCELLED

10. Under the **Status** column select **Ready to Close** if there are *Material Requests* that still need to be posted to the *Work Order*; if not, select **Immediate Close** and the following screen will be displayed.



Work Order **11-004642** Created By SREL Date Created Sep 29, 2010 10:22 AM

Description: STRIP AND REWAX FLOOR IN MEN'S BATHROOM

Status: READY TO CLOSE

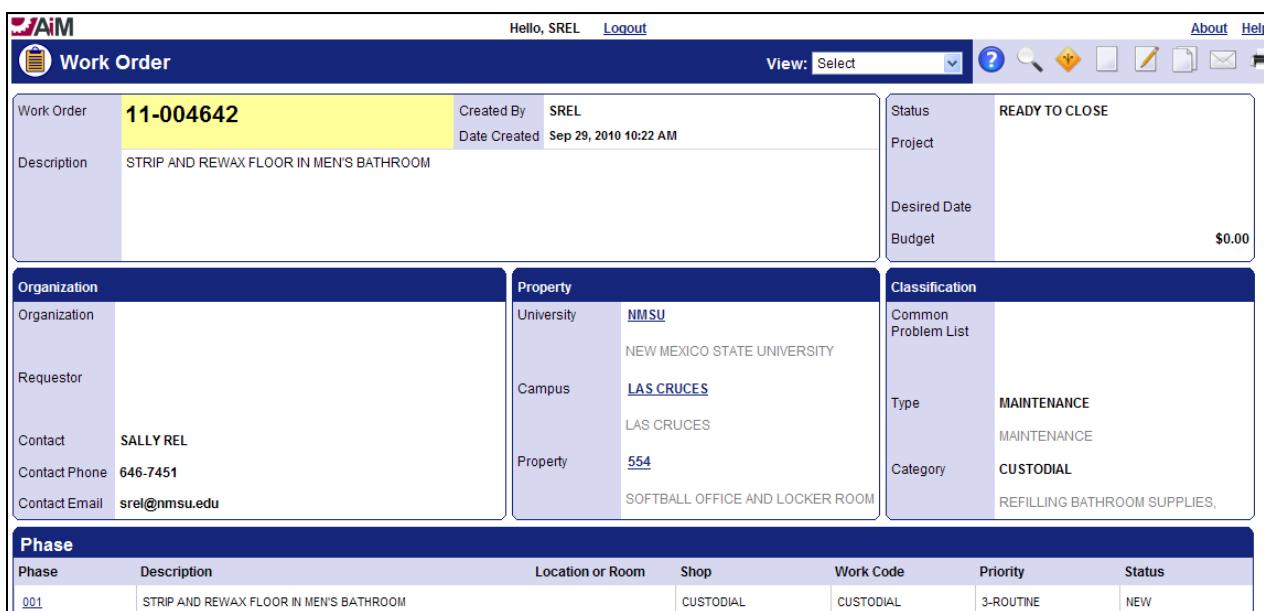
Organization: Organization [redacted], Requestor [redacted], Contact: SALLY REL, Contact Phone: 646-7451, Contact Email: srel@nmsu.edu

Property: University: NMSU, Campus: LAS CRUCES, Property: 554, Location: SOFTBALL OFFICE AND LOCKER ROOM

Classification: Common Problem List, Type: MAINTENANCE, Category: CUSTODIAL, Description: REFILLING BATHROOM SUPPLIES

Phase: 001, Description: STRIP AND REWAX FLOOR IN MEN'S BATHROOM, Location or Room: SOFTBALL OFFICE AND LOCKER ROOM, Shop: CUSTODIAL, Work Code: CUSTODIAL, Priority: 3-ROUTINE, Status: NEW

11. Click on the **Save** icon, then click on the **Print** icon if a copy is needed.



Work Order **11-004642** Created By SREL Date Created Sep 29, 2010 10:22 AM

Description: STRIP AND REWAX FLOOR IN MEN'S BATHROOM

Status: READY TO CLOSE

Organization: Organization [redacted], Requestor [redacted], Contact: SALLY REL, Contact Phone: 646-7451, Contact Email: srel@nmsu.edu

Property: University: NMSU, Campus: LAS CRUCES, Property: 554, Location: SOFTBALL OFFICE AND LOCKER ROOM

Classification: Common Problem List, Type: MAINTENANCE, Category: CUSTODIAL, Description: REFILLING BATHROOM SUPPLIES

Phase: 001, Description: STRIP AND REWAX FLOOR IN MEN'S BATHROOM, Location or Room: SOFTBALL OFFICE AND LOCKER ROOM, Shop: CUSTODIAL, Work Code: CUSTODIAL, Priority: 3-ROUTINE, Status: NEW

The Closing Phases and Work Orders process is now complete!